9-2022

Learning as We Go: How Emergent Process Supports Sustainable Community and Philanthropic Change

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Recommended Citation

Learning as We Go: How Emergent Process Supports Sustainable Community and Philanthropic Change

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Introduction

Many funders struggle with sharing power in community-led processes. How do foundations step back from their positions of power, stop treating their communities as problems to be solved, and start engaging genuinely and generously in resident-led development efforts? Activating the humanities in community and funder engagement could be one answer.

Between February 2019 and April 2020, the PA Heart & Soul Learning Project sought greater clarity about the direct experience of participants in a humanities-driven community planning pilot in three Pennsylvania locations: Greater Carlisle, Meadville, and Williamsport. Beginning in 2014, PA Humanities drew upon the work of Orton Family Foundation to deploy the Community Heart & Soul method, which centers community planning and civic engagement around connecting people to each other, and to the many assets of the places they live, through individual storytelling and collective narrative building.

The Learning Project — structured as an appreciative inquiry evaluation of the model's implementation and guided by a Learning Advisory Group of funding and implementation partners and community residents — concluded that an emergence-focused and humanities-driven approach can produce sustainable community plans informed by resident voices, particularly those who have been historically marginalized. Perhaps more important, allowing emergent learning to shape PA Heart & Soul strategy led

Key Points

- Beginning in 2014, PA Humanities, one of 56 state and territorial humanities councils across the country, drew upon the work of Orton Family Foundation to deploy the Community Heart & Soul method, which centers community planning and civic engagement around connecting people to each other, and to the many assets of the places they live, through individual story-telling and collective narrative building.

- Between 2015 and 2018, PA Humanities awarded matching grants to three locations in Pennsylvania — Greater Carlisle, Meadville, and Williamsport — to pilot PA Heart & Soul, a humanities-based, resident-driven community planning process that cultivates a shared sense of belonging among residents, engages them in thinking critically and creatively about community life, and involves them in decision-making and development to strengthen the social, cultural, and economic vibrancy of place.

- The PA Heart & Soul Learning Project, launched to seek greater clarity about the direct experience of participants, was structured as an appreciative inquiry into the model's implementation and guided by a Learning Advisory Group of funding and implementation partners and community residents.

to stronger engagement by residents, improved funder-community relationships, and new ways of showing up for PA Humanities and its partners.

This article presents researchers' findings about the impact of the humanities-driven model and explores potential lessons for place-based grantmakers seeking inclusive, people-centered community change. Based on these findings, PA Humanities is reformulating its community-building strategy.

PA Heart & Soul: Humanities-Driven and People-Centered Community Building

PA Humanities is one of 56 state and territorial humanities councils in the United States. Each is a private, nonprofit partner of the National Endowment for the Humanities. State humanities councils were created by the Endowment in the 1970s as what Elizabeth Lynn (2013) calls an "ongoing experiment" to ensure greater access to the public humanities for all citizens, strengthen American democracy and good citizenship, and be responsive to the needs of the time (p. 7). PA Humanities reinterpreted this mission and began redefining itself and the humanities in 2012. Recalling the strategic shift during a Learning Project interview, PA Humanities Executive Director Laurie Zierer (personal communication, November 2, 2019) said, "We aimed to take the books off the shelves and put them in the hands of residents to put the humanities in action for community-led change."

PA Humanities (2021) recognized an untapped opportunity to enact social change with its mission "to champion the humanities as a means to spark civic engagement, build community, educate, inspire, and make long-lasting change" (p. 1), redefining the humanities as the means by which

> we come to understand and connect through the sharing of human experiences. Storytelling, historical perspectives, personal interpretation, creativity, and deliberative conversations are the tools that the humanities provide everyday people. Equipped with these resources, communities can document their own culture and move forward in shaping their homes. … Dialogue leads to community building, which drives us to collective action. (p. 4)

PA Heart & Soul is a humanities-based, resident-driven community planning process that

How do foundations step back from their positions of power, stop treating their communities as problems to be solved, and start engaging genuinely and generously in resident-led development efforts? Activating the humanities in community and funder engagement could be one answer.

Key Points (continued)

- The Learning Project concluded that an emergence-focused and humanities-driven approach can produce sustainable community plans informed by resident voices, particularly those who have been historically marginalized. Perhaps more important, allowing emergent learning to shape PA Heart & Soul strategy led to stronger engagement by residents, improved funder–community relationships, and new ways of showing up for PA Humanities and its partners.

- This article presents researchers' findings about the impact of the model; describes how PA Humanities, a nonprofit partner of the National Endowment of the Humanities, is reformulating its civic engagement strategy based on these findings; and explores potential lessons for place-based grantmakers seeking inclusive, people-centered community change.

cultivates a shared sense of belonging among residents, engages them in thinking critically and creatively about community life, and involves them in decision-making and development to strengthen the social, cultural, and economic vibrancy of place. PA Humanities believes people can shape the future of their communities through the power of stories and

Story gathering can take many forms, from notes on a chalkboard to in-depth interviews, and it all comes together to paint a picture of what matters most to residents, build social capital, and address community culture as a first step in community and economic development.

strong relationships. The relationship it has forged with the Orton Family Foundation and Community Heart & Soul reflects its commitment to learn and partner with others to achieve a more equitable society.

An operating foundation established in 1995 by the founders of the Vermont Country Store, Orton seeks to support community engagement and change both with and beyond traditional municipal planning and economic development professionals. Orton's four-phase process, which it began developing in 2004, helps small cities and towns (those with a population less than 50,000) bring their communities together to create community action plans. Key to the Community Heart & Soul[1] process is learning what matters most to residents by gathering hopes and ideas from as many of them as possible.

As it is practiced by PA Humanities, residents collect and analyze stories from diverse and underrepresented groups in their community, especially those not typically invited to make

decisions. Story gathering can take many forms, from notes on a chalkboard to in-depth interviews, and it all comes together to paint a picture of what matters most to residents, build social capital, and address community culture as a first step in community and economic development. A community's shared desires inform a unique action plan and understanding of its identity and agency. In the process, PA Heart & Soul hypothesizes that communities become more connected, self-reflective, resourceful, and resilient.

The PA Heart & Soul Learning Project

Between 2015 and 2018, PA Humanities awarded three pilot communities — Greater Carlisle (2018 population of Carlisle urban cluster 37,695), Meadville (2017 population 12,973), and Williamsport (2018 population 28,462) (U.S. Census Bureau, 2021a, 2021b, 2021c) — $281,600, with a 1-1 matching requirement. In total, the three communities raised $356,000 to support PA Heart & Soul efforts. All funds regranted to the sites came from the council's annual NEH grants.

At the conclusion of the pilot, in 2019, PA Humanities launched the PA Heart & Soul Learning Project, working with two research consultants and a Learning Advisory Group,[2] to seek greater clarity about the direct experience of participants and to help PA Humanities deepen relationships with Pennsylvanians, implement Heart & Soul in other Pennsylvania communities, and support and advocate for similar humanities-based efforts in other states.

Learning and dialogue have been essential components of PA Humanities' Heart & Soul strategy since its launch in 2015. "We were learning as we went" proved a common refrain expressed by participants, though rarely in frustration. The experimental nature of PA Heart & Soul attracted residents looking for new ways to engage with neighbors. Just as emergent

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[1] See https://www.communityheartandsoul.org/

[2] The Learning Project was guided by a 17-member Learning Advisory Group (LAG), which includes representatives from the core PA Humanities project team, funding partners, and each of the sites. The LAG has helped articulate learning questions, pursue research, and identify grantees, community members, and other partners whose stories will be essential to this inquiry. The approach offered multiple opportunities to get a broad range of diverse perspectives, with several individuals participating in a focus group, a one-on-one interview, and the LAG, and others participating in one or two of these activities. (See Appendix.)

strategies privilege experimentation and iteration, this effort prioritized real-time learning through trust-building, coaching conversations, peer exchange, and open-ended reflection exercises. The six-month Learning Project provided a distinct and complementary opportunity for "after-action" reflection and dialogue. The project was careful to align with Community Heart & Soul values, namely: ask what matters most, include everyone, and play the long game.

The researchers approached the Learning Project with appreciative inquiry (Preskill & Tzavaras Catsambas, 2006) using participatory action research methods, collaborating with staff of PA Humanities, the Orton Foundation, PA Heart & Soul participants, and other stakeholders with the expectation that "all concerned, including the researchers, can contribute to investigating and making sense of [what's happening] in order to find ways to change it" (Chevalier & Buckles, 2013, p. 28). Data were collected through phone interviews with several cofunders of the pilot, as well as a two-day site visit to each community that involved:

- community tours, led by project coordinators;

- site-specific, one-on-one interviews (on site and by phone) with project coordinators; volunteers from leadership, project, stewardship teams; representatives from municipalities and anchor/fiscal institutions; funders; and local reporters (see Appendix);

- on-site focus groups with volunteers from leadership, project, and stewardship teams, and representatives from municipalities and anchor/fiscal institutions (see Appendix); and

- a diverse group of informants for both one-on-one interviews and focus groups.

The researchers conducted and summarized comments from six focus groups with 38 participants and from 34 one-on-one interviews (70 unique informants). Explicit emphasis was placed on inviting informants of color, with inclusion of gender identities, ages, abilities, and sexual orientation comparable to that of project participants generally.

Like PA Heart & Soul, the Learning Project employed an emergent methodology,[3] embracing an ethos of learning and adapting in real time. Learning Advisory Group, interview, and focus group participants noted that the project felt like an extension of PA Heart & Soul. One informant remarked that the focus group experience felt "cathartic" — a chance to process Heart & Soul experiences and next steps in a new way. Not surprisingly, then, the Learning Project revealed both opportunities and challenges for PA Humanities and its humanities-driven community-building efforts.

The researchers returned to the council in 2022 to reflect with staff about how emergent strategy and emergent learning are helping Heart & Soul, and PA Humanities as a whole, to pursue inclusive, people-centered community change.

Emergent Strategy, Emergent Learning

Taking complexity seriously means that learning be built on cycles of acting, sense making, and drawing implications for action — as action is the essence of strategy.

– Patrizi et al., 2013, p. 62

From an initial pilot of three to today's 13 PA Heart & Soul communities, PA Humanities has intentionally undertaken a cycle of acting, sense making, and action. With co-funding from state agencies like the Pennsylvania Department of Community and Economic Development, Department of Conservation and

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[3] A collaborative research design process yielded key learning questions and research instruments. Appreciative inquiry surfaced and processed insights from pilot communities to discover what worked well and what proved a challenge. Focus groups and one-on-one interviews privileged storytelling to capture how the PA Heart & Soul model has empowered and ignited change. This narrative building through semi structured conversations has been supplemented by the groundwork laid by the Orton Family Foundation in creating and implementing the Community Heart & Soul model in over 70 communities; additional research on the role of humanities in community building in other contexts; and the perspectives and knowledge of the Learning Advisory Group.

Differences are discomfiting; however, the humanities, by definition, offer a pathway toward iterative action, deploying empathy and creativity to help communities negotiate and transform.

Natural Resources, and Council on the Arts, and from area municipalities and counties,[4] PA Humanities continues to develop tools and technical-assistance resources in response to the communities with whom it partners. By asking this question — *"What is loved?"* — whether it be the arts, environment, sense of place, cross-cultural experiences, or historical and emerging community assets, PA Heart & Soul provides space for exploring and understanding multiple narratives. Differences are discomfiting; however, the humanities, by definition, offer a pathway toward iterative action, deploying empathy and creativity to help communities negotiate and transform.

> *Another key to Heart & Soul's success is that it did not presume a single goal. We didn't go into communities/neighborhoods with a plan; [PA Heart & Soul] just asked questions. The organization and planning that went into the entire effort: no idea was considered unworthy and that made it a collaborative project.*
>
> – Williamsport Heart & Soul volunteer

The ability to grapple with difference, empathize, and rewrite narratives together is the promise of the humanities and the hallmark of a resilient community. For PA Humanities, the Heart & Soul pilot pursued emergent strategy, deploying the tools of the humanities, to strengthen Pennsylvania communities. Two well-developed concepts — emergent strategy and emergent learning — are united in

PA Heart & Soul. The pilot efforts in Greater Carlisle, Meadville, and Williamsport, and PA Humanities' own organizational journey, suggest emergent strategy and learning hold promise for residents, communities, and funders seeking a different way to engage and change.

In her influential work, *Emergent Strategy: Shaping Change, Changing Worlds,* adrienne maree brown (2017) describes emergent strategy as "how we intentionally change in ways that grow our capacity to embody the just and liberated worlds we long for" (p. 6), and the elements of emergent strategy as learning how to be "fractal, how to be adaptive in right relationship to change, non-linear and iterative, resilient (transformative justice), interdependent and decentralized, and always creating new possibilities" (p. 16). Akin to PA Heart & Soul's open-ended questions, emergent strategy offers pathways to social change less dependent upon rigid timelines, linear flow charts, and high-handed directives. Instead, brown writes:

1. Small is good, small is all. (The large is a reflection of the small.)

2. Change is constant. (Be like water.)

3. There is always enough time for the right work. There is a conversation in the room that only these people at this moment can have. Find it.

4. Never a failure, always a lesson.

5. Trust the People. (If you trust the people, they become trustworthy.)

6. Move at the speed of trust.

7. Focus on critical connections more than critical mass — build the resilience by building the relationships.

8. Less prep, more presence.

9. What you pay attention to grows. (p. 44)

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[4] These include Ambridge, Beaver Falls, Cameron County, Carbondale, Dillsburg, Mount Holly Springs, Tidioute, Upper Chichester, Youngsville, and Wyoming County, in addition to Greater Carlisle, Meadville, and Williamsport.

As Darling et al. (2016) described in *Emergent Learning: A Framework for Whole-System Strategy, Learning, and Adaptation,* citing the work of complexity scientist John H. Holland, emergent strategy is about

> more than simply finding adaptable solutions or correcting course based on evidence. Emergence is a process by which, through many interactions, individual entities, or "agents" create patterns that are more sophisticated than what could have been created by an individual entity. And, as a corollary, no one entity (e.g., funder, grantee, or expert) could have envisioned the entire solution a priori. (p. 60)

Emergent strategy finds the conversation in the moment that is most capable of illuminating experience and most relevant to the actors in play.

Equally essential to emergence and emergent strategy, as brown suggests, are concepts of trust and agency. Without trust, the dialogue is artificial and inequitable. Harmful power dynamics are replicated and reified. Without agency, the conversation misses or excludes important perspectives, experience, and voices. As Rashad Robinson, president of Color of Change, the nation's largest online racial justice organization, has said, "Never mistake presence for power" (Lowery, 2021).

Exploring emergent strategy in the context of philanthropy, Patrizi et al. (2013) invoke emergent learning as a means of implementing emergent strategy, while suggesting philanthropy is challenged to do either. The authors argue, instead, that discounting emergence is among the unintended consequences of its reliance on strategic philanthropy, which Paul Brest (2015) has described as including "an expected return mindset [to] give a philanthropist some sense of whether, at this particular moment in time, the game is worth the candle" (para. 8). Patrizi et al. (2013) describe this pursuit of certainty via evidence-based approaches:

> The typical foundation strategy document takes the form of a table organized into columns presenting lists of recommended interventions or actions, outputs, outcomes, and impact (broader

Emergent strategy finds the conversation in the moment that is most capable of illuminating experience and most relevant to the actors in play.

societal change expected). Connections are depicted by arrows between the columns, and the table is often accompanied by a set of performance indicators aligned with the outputs and outcomes. The illustration of strategy in this manner, while easing communications, obscures a great deal of important information as it tends to downplay assumptions and, in particular, creates the illusion that the work is simple and certain and can be understood in simple and certain terms. (p. 53)

At the margins of foundation flow charts rest iteration, challenged assumptions, systemic racism, misogyny, socioeconomic exploitation, and all the visible and invisible injustices that might otherwise disrupt "the drive to portray strategy as simple, certain, and under control" (Patrizi et al., 2013, p. 54).

Alternatively, emergent strategy seeks to recognize, include, and ensure the agency of those with whom a foundation works. What results is a nonlinear, multivariable, sometimes chaotic, often messy strategy in which predictable outcomes decline, but trust, relationships, and connections grow. To move from groups of trusting, empowered people to positive, sustained social change, however, is hard work. The word "strategy" is as important as the word "emergent"; the strategy implies collective action. Emergent strategy — with its promise of agency, trust, and collective action — is the opportunity always within philanthropy's grasp, and the one philanthropy too often allows to slip away.

Even when committing to emergent strategy, philanthropic orthodoxies often do not or cannot align with the fluid nature of progress and

Adding presence and timing to trust, agency, and collective action, then, provides the profoundly simple and staggeringly difficult imperative to allow for emerging and learning together throughout and beyond the catalyzing action — not just when the money is given, and until the money is spent.

setbacks, diverse and divergent narratives. As the Equitable Evaluation Framework[5] reminds us, these orthodoxies around what counts as "credible evidence,"[6] who is the evaluation user and who the subject of evaluation, and the prioritization of rapid results over trust and relationship building are grounded in the U.S. settler-created industrial philanthropic complex, not in the people and places whom philanthropy is presumably serving.

Adding presence and timing to trust, agency, and collective action, then, provides the profoundly simple and staggeringly difficult imperative to allow for emerging and learning together throughout and beyond the catalyzing action — not just when the money is given, and until the money is spent. As brown (2017) delineated above: "Less prep, more presence." Once unleashed in a complex environment, emergent strategy has the potential to sustain itself. Emergent strategy is implicit in many efforts to counteract philanthropic orthodoxies: PEAK Grantmaking's Narrow the Power

Gap; the Trust-Based Philanthropy Project;[7] participatory grantmaking;[8] and the Equitable Evaluation Initiative. Each serves as a reminder that top-down, transactional philanthropy is not just inequitable, but less capable of impact. And, even still, the invisible orthodoxies of philanthropic practice remain.

Replacing summative evaluation and flow charts will require a deliberate grapple with structures and principles embedded within foundation operations. Emergent learning offers just such a deliberate grapple. Darling et al. (2016) provide practices designed to help foundations follow through on the promise of emergent strategy, in part, by "help[ing] make thinking visible and support real-time and peer learning" (p. 59). Essential to a deliberate emergent learning practice are conditions supportive of learning (i.e., space for vulnerability, candor, and experimentation). Each is necessary for learning and, again, too often prohibited by foundation requirements, conditions, and terms. Darling et al. argue that foundations must not merely emphasize the outcomes of an initiative, but also seek to create conditions under which outcomes can be achieved: "To create the conditions for emergence, funders need to distinguish between the goal (the 'what') and strategies (the 'how'), and allow grantees the freedom to bring their own best thinking to how to achieve their shared goal" (p. 62).

Lessons from People-Centered, Humanities-Driven Emergent Strategy

Communities — like all living systems, as brown reminds us — are constantly changing, evolving, and emerging. From the start, PA Humanities grasped the emergent nature of its Heart & Soul initiative, while knowing it was wading into deep community work in new ways. The staff and board also knew the status quo of transactional, hands-off grantmaking was

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[5] See https://www.equitableeval.org/framework.

[6] One of the orthodoxies of foundation evaluation — "tightly held beliefs … grounded in the U.S. settler-created industrial philanthropic complex" — that the Equitable Evaluation Framework names is that credible evidence only comes from quantitative data and experimental research.

[7] See https://www.trustbasedphilanthropy.org/.

[8] See https://participatorygrantmaking.issuelab.org/.

no longer viable. For example, the council committed its own NEH resources, giving itself and the communities the flexibility they needed.

Emergent strategy, coupled with emergent learning, was aligned with PA Humanities' intentions to build trust, expand agency, and support collective action. The approach provided space to learn and change. Three years into its pilot effort, the decision to launch a "learning project" instead of an evaluation or assessment was intentional. PA Humanities saw the limitations of a compliance mindset. As described by Patrizi et al. (2013), PA Heart & Soul Learning Project added more formalized reflective practice, participatory learning, and external facilitation to surface actionable findings:

> External facilitation to guide reflective practice and raise challenging questions will help the group explore variation in perspective and action that emerges from the strategy work. The facilitator can play devil's advocate, push against confirmatory bias, and examine what doesn't work as well as what does work (and for whom, how, and why). (p. 62)

While not always comfortable or easy, the lessons gleaned from the PA Heart & Soul Learning Project rewarded the instinct to break with philanthropic orthodoxy and reinforced PA Humanities' commitment to emergent strategy coupled with emergent learning.

The Learning Project also surfaced instructive examples of PA Heart & Soul activating the humanities in communities. In particular, Heart & Soul sites deployed the humanities by prioritizing:

- active listening,

- interviewing and storytelling,

- dialogue and idea generation,

- collaborative action planning and agenda setting,

- transparent communication,

- accountability to and inclusion of all community members,

- follow-through, and

- continuous learning.

As one funder suggested, "Heart & Soul makes the humanities more accessible." Community informants agreed, noting that the humanities became better defined and more meaningful to many volunteers because of their participation:

> Through Heart & Soul, I've seen how the humanities are relevant to my work, with reconciling the past, race, and racial justice. Humanities give us ways to talk about and process differences, process trauma. Humanities play a huge role if you are going to work in a community. I never would have thought so before.
>
> – Greater Carlisle resident

PA Heart & Soul spurred and accelerated positive, inclusive community change, according to informants:

- New voices (especially Black residents, newcomers, immigrants, lower-income renters, younger millennials, people of color, and politically underrepresented groups) engaged in planning for their community's future.

- The preservation of Mt. Tabor AME Zion Church and Cemetery in Mount Holly Springs is an ongoing project.

- Residents in Greater Carlisle mobilized around issues of substandard rentals and improvements in rental ordinances.

- Carlisle Area High School students organized to bring issues of concern, including racism and bullying, to the school board.

- Preservation priorities identified by Heart & Soul have been embedded in the Cumberland County Historical Society's work.

- Small businesses in Meadville saw expansion and greater local support, as did the arts and local artists.

Techniques devised and improvised by the pilot communities in these three very different places offer practical, valuable intelligence for future humanities-based civic engagement efforts.

- A community garden was established in a low-income, diverse Williamsport neighborhood.

- A project coordinator was elected to the Meadville City Council on a Heart & Soul values plan.

- Residents' stories were featured in the film *Heart of Williamsport,* which premiered in downtown Williamsport in January 2018.

- The City Council adopted the *Heart of Williamsport* values.

Humanities-driven Heart & Soul processes led to public articulation of shared values for community planning, centering what residents care about: "We admire our scenic views and beautiful natural surroundings; this tranquil environment enhances our quality of life and provides plenty of outdoor activities that utilize our mountains, forests, rivers, trails, and parks"[9] and "We value the diverse educational opportunities and programs provided by our schools, colleges, libraries, and organizational collaborations that offer mentors and activities for everyone, promoting a strong sense of community pride"[10] (Heart of Williamsport, 2017).

These community values are given life through collective action plans adopted by city government or other stakeholders. All three

communities signaled a commitment to living these values in current and future decision-making, suggesting one outcome of PA Heart & Soul is a different way of making decisions.

Centering people, especially people not typically included in community planning, seemed to be taking hold. For example, at the start of one focus group, a participant asked that the Heart & Soul values guide the focus group itself. In another community, an informant spoke of community organizing activities that "were Heart & Soul and were living heart and soul values." Yet another informant spoke of the campaign platform of two candidates running for Meadville City Council, noting, "Look, this platform is Heart & Soul issues, informed by the Heart & Soul process and values; it's the way we think about community now."

Lesson No. 1: Adaptability Is a Strength and a Challenge

The early phases of PA Heart & Soul proved difficult to explain because no one, including PA Humanities, had ever engaged in this kind of planning. No one knew what an open-ended, values-driven process might generate. Techniques devised and improvised by the pilot communities in these three very different places offer practical, valuable intelligence for future humanities-based civic engagement efforts. Moving from listening to learning to collective analyzing of the stories and participatory action planning held the process accountable to the three Community Heart & Soul values. For communities used to having less-than-authentic citizen review processes, many residents reported, PA Heart & Soul turned typical planning upside down.

The PA Heart & Soul model pursued by PA Humanities in partnership with the Orton Family Foundation is an effective approach to humanities-based civic engagement — similar to but distinct from other approaches to engaging people in community priorities and decision-making. Tours of PA Heart & Soul sites, as well

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[9] See *Heart and Soul Value Statement No. 2* at https://heartofwilliamsport.org/2017/07/07/value-statement-no-2/.

[10] See *Heart and Soul Value Statement No. 4* at https://heartofwilliamsport.org/2017/07/07/value-statement-no-4/.

as interviews and focus groups, surfaced the ways techniques were adapted and improved with potential for replication in other Heart & Soul communities. Hindsight, as always, has given participants insight into what they might have done differently. Rather than label efforts successes or failures, each pilot community's adaptations and tweaks are described below. Each community surfaced lessons significant and authentic to its own place, time, and residents:

- Go where residents are already gathering and they (not you) feel most comfortable.

- Understand it takes trust to share stories, especially because "traditionally the stories that mattered were white stories."

- Engage young people in leadership and story collecting, even if it means pushing adults to relinquish space and power.

- Make the connection between Heart & Soul and public service; inviting new voices led to campaigns for public office. New City Council Member Autumn Vogel remarked, "The City Council campaigns were a real win for My Meadville. The pillars I ran on are informed by My Meadville's outcomes."

- More tools are needed to shift from power "over" to power "shared."

- Define leadership as the willingness to show up and ask, "How can I be helpful?" Do not claim special knowledge; just help other people to show up (with a person-to-person invitation, not email).

- Focus on leveraging assets to differentiate PA Heart & Soul from deficit- or problem-focused community change.

- Reach out to the media far in advance of events and make it clear that their input is considered valuable and won't be dismissed.

These reflections represent both the effectiveness and the needed tweaks, as well as the weaknesses that needed to be addressed of the PA Heart & Soul model. Again, how these tactics emerged proved as important as what happened, manifesting the key values of embracing emergence, such as honoring the "conversation in the room that only these people at this moment can have" and the growth from what is tended to (brown, 2017). Informants described how a simple practice could become positively disruptive when performed in a different location, with a fresh spirit, with new voices in leadership, with greater humility or with no "agenda" beyond listening and learning.

Lesson No. 2: Communities Define Themselves

For the PA Heart & Soul sites, externally imposed geographic and project boundaries proved a hindrance as often as a rallying point. While "place" is obviously central to the Community Heart & Soul model, participants wondered whether it might be more easily pursued in the kind of small towns found in Vermont and the rest of New England. PA Humanities was working in larger municipalities and regions. Williamsport, for example, is a city of 30,000 residents, where citywide consensus and engagement proved more challenging.

The city borders defined the project in Meadville, leaving businesses just over the border unable or unwilling to participate financially. While PA Humanities has been successful in attracting the involvement of municipal and regional government entities, these tend to focus on residents as taxpayers, within a specific jurisdiction. Again, this can render less meaningful the social and cultural ties that exist beyond arbitrary borders.

In Greater Carlisle, the project's regional approach proved a challenge and an opportunity. The small town of Mount Holly Springs was able to integrate its existing community-building efforts, including grassroots, door-to-door activism around specific priorities, with PA Heart & Soul. This focused action plan, however, left Mount Holly Springs residents less willing to be subsumed into a larger regional action plan prioritizing more populous Carlisle.

Traditional community planning gives municipalities, large employers, and anchor institutions significantly more power than individual residents and smaller organizations.

As an explicitly inclusive and emergent strategy, PA Heart & Soul communities disrupted the roles of civic entities, anchor institutions, private and public sector leaders, and resident groups.

The project found it nearly impossible to coalesce around regional priorities:

> *The Heart & Soul model, from a New England small village, doesn't always apply to dispersed communities like Greater Carlisle. If the borough of Carlisle could support Heart & Soul as a formal initiative within another institution, that might be great. Could Heart & Soul live on as a community fund that supports the values statements/action plans?*
>
> – Greater Carlisle resident

Greater Carlisle decided to seat distinct stewardship committees for the city of Carlisle and for Mount Holly Springs to make action planning more representative of the two very different communities. The flow of cultural, financial, human, geographical, and technical identification and resources tended to be unique to each community. Whether this is true of the "Pennsylvania version" or tracks to population size more generally is an opportunity for inquiry and adaptation.

Lesson No. 3: Emergent Strategies Call for Power to Be Shared

Narrowing the power gap between funders and community members, as advanced by PEAK

Grantmaking, the National Committee for Responsive Philanthropy, and participatory grantmaking leaders, requires "ascribing equal value to the experiences, resources, and needs of each partner" (PEAK Grantmaking, n.d., para. 1). With the value of "including everyone" (especially new and previously excluded voices), the PA Heart & Soul model and humanities-driven community engagement defined success by as many different people as possible engaging actively and authentically, regardless of positional power and agenda. To greater and lesser degrees, then, all three communities struggled with naming and addressing power. Traditional community planning gives municipalities, large employers, and anchor institutions significantly more power than individual residents and smaller organizations. As an explicitly inclusive and emergent strategy, PA Heart & Soul communities disrupted the roles of civic entities, anchor institutions, private and public sector leaders, and resident groups.

Oppressive, even violent experiences surfaced during the storytelling phase. Each community had to forge new relationships while managing existing power structures. Each community approached this challenge in different ways, based on their own unique contexts. While the PA Heart & Soul process is replicable, authentic sharing of power proved unique to the communities themselves. Explicitly prioritizing a people-centered, rather than institution-centered, approach proved invaluable:

> *The fundamental mission is reaching unheard voices, and probably anchor institutions do not know those voices — which is why the leadership committee is essential, so that you have a real community network analysis. Decentralizing power is the point of [Heart & Soul] and is simply not a match with leadership by a traditional anchor institution.*
>
> – Greater Carlisle resident

Informants from the three communities described naming elephants in the room — long-standing resistance to change, outright discrimination and disenfranchisement, and other tensions — in a collective, public manner. While the Heart & Soul process gave the

communities the chance to name issues that had long gone unnamed, they struggled to decide what to do next. Often, the act of naming the issue proved cathartic and encouraged participants to explore ways to share power, encourage democratic participation, and engage in more equitable decision-making:

> Racial injustice in Williamsport is a fact: So, what are we going to do about it? We can't have two economies, two communities; it won't work. We have to come together. If we want Black folks to spend money downtown, how do we make that happen?
>
> – Williamsport resident

Greater Carlisle's Mt. Tabor AME Zion Church, in the town of Mount Holly Springs, exemplifies Heart & Soul values as well as good timing and concurrent efforts to deepen civic engagement and cross historical and political boundaries. Even with Mt. Tabor's success, because Greater Carlisle covered such large and diverse geography, its volunteers often felt they were failing because they had not achieved a single, unified action plan urged by the Heart & Soul model. Greater Carlisle struggled with how to share its challenges with PA Humanities because PA Humanities was the funder. Without this information, the council could neither help Greater Carlisle strategize nor say, "Don't worry — you're doing great." When funders and grantees are valued only for the role they play in a financial transaction, impact suffers. PA Humanities has had to account for the power that comes embedded in the relationship of funder and grantee.

PA Heart & Soul has the potential to bridge and redefine relationships among groups and institutions. New skills and tactics, voices, and strategies are needed to help communities grapple with past and current challenges: perspective shifting, empathy, storytelling, and space for multiple narratives. The pilot communities were hungry for techniques and strategies to delve more deeply into healing relationships. As one insightful Meadville resident suggested, Heart & Soul "was a major disruption in how typical 'planning' is done, and yet, we seemed unprepared for or surprised by the disruptiveness!"

PA Humanities has had to let go of the power that comes embedded in the relationship of funder and grantee.

Letting Go of a Compliance Mindset: How PA Humanities Changed

PA Humanities not only expected PA Heart & Soul to be disruptive, it also welcomed the opportunity to move away from more traditional transactional grantmaking and toward relationships and partnerships. Nevertheless, staff were not fully prepared for all the new ways of working Heart & Soul would teach them.

Learning Project interviews and focus groups convinced PA Humanities of Heart & Soul's effectiveness in catalyzing and enhancing community building in three very different Pennsylvania communities. To translate the project's key lessons into action, PA Humanities looked to the Learning Advisory Group to interpret findings and to its staff to apply what was learned. Even more importantly, Heart & Soul demonstrated the relevance of the humanities to communities in new ways. With its aspirations within reach, the council added communities to its Heart & Soul roster and made an organizationwide commitment to its learning-while-doing strategy. PA Humanities is committed to activating the humanities in community building through expanding PA Heart & Soul into more Pennsylvania communities, with more on the horizon. To get there, it is forging new paths.

Decentering the Transactional to Center Community

"People-centered community building" is perhaps better defined by what it is not. While traditional activities start with a plan and seek approval for it, Heart & Soul starts by asking open-ended questions and getting answers from diverse perspectives. In the pilot communities, PA Heart & Soul actively invited and valued participation for its own sake, met residents where they were (rather than requiring attendance at

In the pilot communities, PA Heart & Soul actively invited and valued participation for its own sake, met residents where they were (rather than requiring attendance at a 6 a.m. or 7 p.m. meeting), provided child care and food, and forged personal connections.

a 6 a.m. or 7 p.m. meeting), provided child care and food, and forged personal connections. The plans differed because the populations, histories, assets, and perspectives differed. These differences, rather than recipes for chaos, were evidence the approach was working. Looking back, PA Humanities staff sees the mixed messages it sent to communities; an overemphasis on accountability measures, single timelines, and predefined deliverables spoke to their unquestioned, funder-centered perspective.

Internal demands for compliance and deadlines led to fraught community conversations about accountability, which led to even more difficult internal and external conversations. The power dynamics in each case favored the funder, sometimes putting fiscal sponsors, local project coordinators, and volunteer groups at odds with one another. Two significant changes seemed to shift the dynamic. On the tactical side, PA Humanities staff moved Heart & Soul from an individual staffer's portfolio to a project of programs as a whole and, really, of the whole organization:

> *At the start, we had one staff member who really knew the communities on the ground. And the organization, as a whole, was siloed; programs didn't know what communications was doing and vice versa. So it was challenging even internally to tell*

the PA Heart & Soul story. We learned we needed a lot of staff time to be dedicated to this work

– PA Humanities staff member

Today, PA Humanities' development team sits in on program meetings and the communications team participates in on-the-ground work in communities. All levels of the organization, from board to executives to program staff, feel connected to its community-building strategy. Program staff interviewed summed it up this way: "De-siloization internally is better at supporting community work externally."

On the adaptive side, PA Humanities had to learn to stop centering itself in the Heart & Soul work, which led to crucial staffing and structural changes. The nonlinear, sporadic, idiosyncratic, decentralized nature of PA Heart & Soul — markers of the need for both emergent strategy and trust-based philanthropy — did not align with traditional transactional funder-centered checklists and reporting requirements. In fact, centering funders' needs is so ingrained that participants, too, struggled to understand, much less ameliorate, the tensions and miscommunications surrounding early community conversations. Moreover, as a state humanities council whose fundamental mission is to champion the humanities to spark civic engagement, build community, educate, inspire, and make long-lasting change, it felt pressure to center the narrative around the humanities.

While the humanities implicitly informed Heart & Soul, forcing it to be named explicitly felt inauthentic and beside the point. Nevertheless, the shift was controversial for both a primarily academic board and for an organization dependent upon public funding. Realistically, the council had to be concerned with "how we would look" if things didn't go well. Initially, feel-good stories were prioritized over the more realistic, messy, and ultimately human elements of community change. Board and staff spent time defining what was meant by "public humanities in action." Finally, PA Humanities staff recall a board member announcing: "Let's stop this navel-gazing and show what the humanities can do and explore why it's relevant

to Pennsylvanians." Staff interviewed believed this statement to set the stage for PA Humanities to become what Amy Edmondson (2018) calls "the fearless organization." The staff member suggests, "From that point on, we had to get comfortable with taking risks and focusing on what we were learning as we did our work with communities."

Prioritizing Relationships

"We must respect you and we must be worthy of respect. Most funders ask, 'What are we getting for our money?' Instead, we are trying to ask, 'What can we offer?'"

– Interview with PA Humanities staff member

Decentering PA Humanities in its community-building work meant putting aside or slowing down other projects. To build authentic relationships capable of transformation, the familiar practices of transactional philanthropy no longer sufficed. From design to implementation, the council needed to consider the impact on relationships first, its comfort and reputation, second. What does this look like, in practice? PA Humanities staff continually asks communities what they need, plays convener rather than leader, and invests in training for residents and its staff — sometimes together.

Speed and scale can sometimes feel like casualties of this approach, but only if you look at community building as a short-term endeavor. As the Equitable Evaluation Framework articulates, the difference between seeing community and power building as a means rather than an end (or ideally, both), as a technique rather than an essential condition for sustained change, are common tensions that trap funders into going for the quick wins (Dean-Coffey, 2017). With its long-term, place-based mission, PA Humanities is in a unique position to negotiate and advocate for a new timeline, people-centered engagements, and enduring relationships. The shift has required it to grapple with how best to advise communities in selecting fiscal sponsors. Of course, a standard operating checklist would be faster, but careful communication about roles and alignment of aspirations is the "move at the speed of trust" approach. It now looks for

> *PA Humanities staff continually asks communities what they need, plays convener rather than leader, and invests in training for residents and its staff — sometimes together.*

all partners to understand and embrace Heart & Soul's transformational potential. Comfort with emergent strategy does not happen overnight, but when it exists, relationships are more authentic and resilient.

The kinds of relationships PA Heart & Soul seeks will take time. In the process, PA Humanities believes the trust developed can heal past wrongs and help communities come together to write their next story with equity at its core. In writing about racial justice, Kad Smith (2019), project director at CompassPoint, describes what PA Heart & Soul hopes to achieve:

> Embodying racial justice and equity means rejecting the notion that taking the time to make room for personal stories, voices, and experiences isn't valuable. Transitioning from a community built on extractive relationships to one of mutual care and support means making room for courageous conversations and healing. It means sharing our politics in the deepest sense by inviting us to share what drives us to make change in the world. It means fundamentally thinking about the way we relate to one another, finding safety in our similarities and solidarity in our differences. (paras. 6-7)

Taking Power Seriously to Make Equity a Priority

Explicitly valuing equity has helped PA Humanities and the Heart & Soul communities to notice, name, and begin to renegotiate the power dynamics too often reinforced by both community planning and transactional grantmaking. The council and community volunteers realized complex, entrenched systems and structures discouraged participation while

By actively seeking diverse participation and including voices not always invited into community planning, Heart & Soul surfaces both latent and active tensions among and between groups. This transformative space can be uncomfortable for everyone — regardless of status, power, and privilege.

protecting the status quo. Articulating shared values proved to be one way to renegotiate these relationships, especially when faced with resistance that went beyond individual differences in opinion. By actively seeking diverse participation and including voices not always invited into community planning, Heart & Soul surfaces both latent and active tensions among and between groups. This transformative space can be uncomfortable for everyone — regardless of status, power, and privilege.

When everyone focused on shared values and community assets, PA Humanities and the communities were better able to renegotiate their roles, relying less on inequitable power structures and more on the needs and goals of the community. Required deliverables and deadlines were not capable of capturing these shifts — both subtle and seismic — occurring in community expectations and inclusiveness.

A funder's humility and flexibility can signal a willingness to disrupt this power dynamic, but PA Humanities had to follow through on that promise by adjusting requirements and contributing in new ways. As communities described needed resources and skills, PA Humanities changed reporting deadlines and provided technical assistance and coaching better aligned with

communities' needs. The positive results and productive relationships have urged fundamental and permanent shifts in how the council works:

> *We'll never engage with communities the same way again. You have to ask questions, commit to inquiry, and be aware of the assumptions you're bringing to the work. We are going into our next arena of work, whether libraries or teen reading or whatever the next thing is, with the loosest of frames. We are here to help build the house, but communities are building it, too. And communities are definitely decorating the rooms.*
>
> – PA Humanities staff member

PA Humanities does not cede all authority and decision-making to local communities, but instead seeks to balance its roles as facilitator and convener, funder and broker, mentor, and coach. Its competencies, networks, and perspective are deployed to enhance specific community efforts, rather than force compliance with requirements. (See Table 1.) Authentic relationships build the kind of trust needed when things go well and when things do not. When a community recently dropped out of PA Heart & Soul, about one year into its effort, PA Humanities staff knew things had stalled partly because of the pandemic, but also that it went beyond that. Because of their investment in relationships, staff had honest conversations with project volunteers:

> *We did an exit interview and while we recognized we had been "the funder," since the initial grant money had been spent and they were opting to end the program, we just urged them to be honest. … The fact that we knew things were not going well was itself the result of building a relationship with them. And, when they are ready to try again, we'll know they are really ready.*
>
> – PA Humanities staff

Metrics and reports have their place. Our findings suggest, however, that a rigorous application process, shared values, and strong relationships are sufficient to meet compliance and accountability needs.

> *We work with communities to decide on a few "non-negotiables" for us and for them. Often, this means,*

TABLE 1 For Mutual Benefit: How Funders Can Move from Contracted Compliance to Emergent Strategy

From Compliance	To Emergence	PA Humanities Is:
Reliance on predetermined/ predictable schedules	Responsiveness in real time to real challenges	• Expanding staffing to make PA Heart & Soul an organization wide effort • Rewarding staff for building quality relationships, not for meeting arbitrary deadlines • Increasing contact with grantees and staff responsiveness
Focus on financial transactions	Redefining and sharing range of resources	• Redefining what "counts" as valuable resources • Offering coaching and co-learning opportunities, which are often as valuable as grants • Discovering residents' insights and assets were as valuable as proprietary "expertise"
Deadlines, requirements, and contracts	Co-creation, adaptation, iteration	• Letting go of abstract deadlines predicted before work began • Embracing emerging learning and new, unexpected activities that surface • Allowing shared values and trust to balance arbitrary requirements with real-time adaptation
Rigid deadlines and boundaries	Responsiveness to movement(s)	• Rethinking what could fit under the umbrella of Greater Carlisle Community Heart & Soul • Letting go of the demand for a new, regionwide action plan • Investing instead in existing activity (in Mount Holly Springs) and emerging organizing of rental community (in city of Carlisle)
Detached assessment	Intentional learning	• Choosing to invest in a Learning Project, rather than "objective" assessment of success or failure • Letting go to learn with grantees and stakeholders in a participatory process that builds power and agency • Intentionally sharing and acting on lessons learned (even the tough ones)
Foundation-centered plans with projected goals and deadlines	Transparent communications and co-creation via stakeholder-informed planning and learning	• Asking the board to imagine how emergent strategy and learning might apply to the next fundraising campaign and other priority work • Sharing the principles of emergent strategy with PA Humanities' board, funders, and partners like the Orton Family Foundation • Working with funders like the National Endowment for the Humanities, which are compliance-bound, to adapt to new models and approaches

for PA Humanities, we need to see a work plan, we want to see that the volunteer group is meeting with their coach, and we want to see increasing levels of community engagement. And all of this can adapt as the effort unfolds.

– PA Humanities staff member

Truly appreciating all resources contributed by all partners — the humanity central to PA Heart & Soul — is helping PA Humanities transition from a transactional funder to a partner in building stronger communities.

Conclusion

Power structures take a lifetime to create — we can't expect them to be challenged in a short amount of time.

– PA Humanities staff

PA Humanities is learning how to release its hold on power, stop treating grantees as problems to be solved, and acknowledge that unquestioned assumptions are, in fact, strategic barriers.

People-centered, humanities-driven community change is disruptive. By combining emergent strategy with an equal commitment to emergent learning, PA Heart & Soul used real-time and episodic insights to stay values-driven, people-centered, and goal-focused. Through Heart & Soul, PA Humanities is learning how power works in communities and in philanthropy. In Carlisle, people-centered engagement meant including tourists, the voices of new residents, young people, history buffs, and long-time residents. In Meadville, it meant low-income, non-property-owning residents, aspiring entrepreneurs, and a younger generation of civic-minded volunteers. Williamsport acknowledged past divisiveness, using love of the arts and community to find common ground and articulate shared values.

By implementing emergent strategy, every aspect of philanthropy — from financial stewardship to donor intent to what counts as professional expertise — can be reimagined. PA Humanities is learning how to release its hold on power, stop treating grantees as problems to be solved, and acknowledge that unquestioned assumptions are, in fact, strategic barriers. By walking alongside communities as each tells a unique story of creativity and character, the council is telling a new story about itself and moving out of silos, into relationships, and toward equity. This is long-term work to which PA Humanities and foundations can commit, while also accepting that what any one funder can do at a particular moment may not be enough to right all the wrongs in communities. Instead, funders must commit to the longer process of change itself. Emergent strategy coupled with emergent learning provides the means for foundations to return again and again, with confidence and humility, to "learning as we go."

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I. Learning Advisory Group LAUNCH MEETING AGENDA

Facilitator Version | Video Conference: Zoom Meeting

Launch Meeting Objectives

1. Get to know one another better
2. Understand and explore Pilot Learning Project objectives, principles, and key audiences
3. Establish the roles and responsibilities of the LAG
4. Begin to identify our key learning questions about Heart & Soul pilots in PA

Agenda

Time	Activities
1 pm	**Welcome! High-level reminder of H&S, pilot learning project** Role of the LAG: As a member of the LAG, you would help us to articulate learning questions, pursue research, and identify grantees, community members, and other partners whose stories will be essential to this inquiry.
1:05 pm	**Getting to know one another better** Please introduce yourself, where you're from, what you do there, and (briefly) share a moment that made you especially proud of your work on H&S. Grantees are the experts in this work. Icebreaker: "What was a moment that made you especially proud of your work on H&S?"
1:30 pm	**Exploring the Learning Project's timeline, objectives, and principles** Please skim attached project timeline (p. 3), draft project objectives (p. 4), and draft design principles (p. 4). Reiterate: Together, we will pursue a collaborative process learning from one another and from the three pilots. General notes about methodology: Focus groups and one-on-one interviews will be structured to privilege storytelling to capture how the PA Heart & Soul model has empowered and ignited change in each community. This narrative building, through semistructured conversations, will be buttressed by the theoretical groundwork laid by the Orton Family Foundation in creating the Heart & Soul model and additional research into the role of the humanities in community building. Walk through project objectives. Walk through the project timeline: • Ask: Any questions about the timing or deliverables or your role? • Focus on the role and responsibilities of the LAG. • Ask: Do you understand what we mean by each objective? • Ask: Are there any questions about the objectives of the project? • Ask: Do you understand what we mean by each principle? • Ask: Are there any principles you would add?
2:10 pm	**Framing the Learning Project to capture the PA Heart & Soul story** Your insights will help us to frame the Learning Project (i.e., talk to the right folks, ask the right questions, collect useful and applicable lessons). To get started, we will be asking for your help thinking through the following questions: • Who are the primary, secondary, and other audiences for this learning project? (PA Humanities team, sites, funders) • What is the best way to learn about the "H&S story" in your community? (will call on site reps here) • How can we capture what is unique about the H&S model itself and how it played out, over time, in each pilot site? (focused on Orton) • How might the H&S stories help us to bring attention to the value of the humanities and gain support for the humanities in communities? Emphasize that this is a learning project, not an assessment or a "grading." We are trying to learn what worked well, what didn't, and how these lessons can inform, improve, and inspire other communities. Let's give the group the questions (see left) in advance. Ask Site Reps to answer first, then others. Finish with: What have we missed? What are our collective "blind spots"?
2:55 pm	**Next Steps and Gratitude**
Adjourn by 3 pm	

Draft **Learning Project Objectives and Design Principles**

Objectives

1. To support all PA Heart & Soul partners' learning and uses of the model in the future, we seek greater clarity about:
   - The direct experience of participants in three pilot PA Heart & Soul locations (Carlisle, Meadville, Williamsport)
   - How lessons learned from each site might inform efforts to deepen relationships, advocate for similar efforts, and communicate lessons learned
2. Made up of the core PA Humanities project team, representatives from funding partners, and representatives from each pilot site, the LAG will:
   1. contribute to the development of priority learning questions and research design, and
   2. help to identify community members, organizations and agencies, government leaders, and other partners whose individual and collective stories will be essential to this inquiry.

Design Principles

We are approaching this learning effort with:

1. Sensitivity to the nature of the information and extreme thoughtfulness about what information gets shared and with whom;
2. Attention to best practices for equitable evaluation — stakeholder-informed design; careful management of data; openness about aggregate findings, lessons learned, and subsequent changes going forward; consideration of power dynamics between and among participants;
3. Interest in grounding the research in relevant theory, pointing to relevant literature and program models, while keeping the research design and products practical;
4. Interest in capturing the complexity of community change; and
5. Our focus on the learning objectives and deadlines, while remaining flexible and iterative.

II. One-on-One Interview and Focus Group Protocols

A. On-site Interviews:

- **Williamsport:** for example, H&S Leadership Team Members, City manager and/or Elected officials, Chamber or Business Associations, Specific Advocates (enviro, low-income, political), School Administration

- **Greater Carlisle:** for example, H&S Leadership Team Members, especially City manager and/or Elected officials, Chamber or Business Associations, Specific Advocates (enviro, low-income, political), School Administration

- **Meadville:** for example, H&S Leadership Team Members, City manager and/or Elected officials, Chamber or Business Associations, Specific Advocates (enviro, low-income, political), especially School Administration

Interviewer:

Interviewee:

Interviewee Bio:

Organization or departmental description/mission:

Date/Time:

Location:

1. How have you been connected to PA Heart & Soul in this community? Who or what helped you decide to get involved? For you, what (if anything) distinguished H&S from other community-building efforts you have seen here? What skepticism did you have about H&S, and was it affirmed or dispelled by your experience?

2. Help me learn about your community and its people and how things generally happen here. How would you describe "W, C, M" to a new resident? How would you describe it to a new person from another country? How would you describe it to a young, older person, person of color, etc.?

3. Let's think about the different types of resources H&S tapped into and sought to increase. Probe for or offer a quick way of thinking about assets: natural, cultural, human, social, political, financial, and built. To what extent did this influence the H&S project? Its successes? Its challenges? What changes have you seen? Probe for/be alert to how they thought of both assets and deficits of the town before H&S and after.

4. This is a project of the PA Humanities Council, so we'd like to think about the Council and the humanities. How did storytelling, resident connections, linking culture and place [the humanities] show up in this effort? How (if at all) has the H&S project changed your perceptions of PA Humanities and/or the "humanities"?

5. Did you see H&S activities making a concerted effort to bring new and different community voices into its processes? How successful was H&S at inviting and sustaining the engagement of new voices? Probe for/be alert to more explicit understanding about the challenges of community power-sharing or other difficult dynamics in their communities.

6. What other partners, agencies, and funders do you think might join in expanding the initiative in Pennsylvania? What's the best way to help PA Heart & Soul appeal to those partners?

7. What does (or could) the future hold for H&S here in "W, C, M"? What advice would you give to the leadership team and PA Humanities?

8. What should we have asked you that we have not? Anything else on the tip of your tongue?

B. On-Site Focus Groups
Focus Group Facilitator:
Date:
Participants:
Types:
- o Volunteers/participants (both minimal/maximum involvement, geography, race, gender, age)
- o Students (college unless n/a; high school)
- o Activities/Advocates (environment, health, economic development, faith, education)
- o Small-/family business owners
- o Healthcare / Hospital / Human services
- o Library / Civic Associations

Supplies:
- o H&S Phase Posters [or written on Flip Charts]
- o Red, Green, Yellow Post-It Notes
- o Sharpie pens
- o Food/Drink

Location: Library, Hotel, Historical Society

ICEBREAKER & INTRODUCTIONS – 20 minutes

Have participants introduce themselves and share: *How have you been connected to PA Heart & Soul in this community?* Then, have everyone pick one question to answer:

a.   *Who or what helped you decide to get involved?*

b.   *What's your favorite thing about TOWN/REGION?*

EXERCISE – 60 MINS TOTAL [in blue]

The PA Heart & Soul Model describes four stages [have the phases and definitions on separate posters]. As you reflect back on your H&S experience in this community, help us understand your experience in TOWN through each phase.

20 mins

ROSE-BUD-THORN

Collectively, use the "rose-bud-thorn" Post-It Note exercise to reflect on each phase, and post a note anywhere you have reflections — write enough to be clear to the rest of the participants (RMW and EM can get greater clarity afterwards from Alice):

Rose = A highlight, success, small win, or something positive that happened

Thorn = A challenge you experienced or something you can use more support with

Bud = H&S ideas *for the future* that have or could blossom

NOTE: Probe along the lines of the HUMANITIES and PARTICIPANTS' EXPERIENCE (not only or overly about the process but in how the process serves humanities, people, community well-being, etc.).

Community Network Analysis
Phase 1: Lay the Groundwork: Build a solid foundation by identifying partners and leaders, spreading the word, and developing a road map for successful PA Heart & Soul community engagement.

Story Gathering and Sharing
Phase 2: Explore Your Community: Gather residents' stories and build relationships across divides. Identify what matters most, which leads to creation of PA Heart & Soul Statements. Examine how statements are affected by community trends and conditions.

Community Conversations/Project Ideas
Phase 3: Make Decisions: Guided by PA Heart & Soul Statements, identify options for the future and base decisions on what matters most to everyone and best enhances and preserves the community's "Heart & Soul."

Action Plan and Stewarding Ideas
Phase 4: Take Action: Partners and residents work together to take action and ownership. PA Heart & Soul Statements are applied to future decision-making and become part of the fabric of the community.

40 MINS

ROSE-BUD-THORN DEBRIEF: MAKE MEANING TOGETHER

15 mins

Allow for "gallery walk" for everyone.

Elizabeth/Rachel guide conversation to collectively clarify and explain terms

5 min break

Then, assign 4 smaller groups (1 group per phase) to review, circle/organize Post-Its around shared themes (common roses, buds, thorns) as well as outliers.

20 mins

Elizabeth/Rachel guide group in discussing each phase to summarize their experience by phase: What themes did we see from roses, thorns, buds? What surprised you? And a few pointed questions based on the learning questions identified below.

Lightbulbs?

RMW/EM are probing for data on the following (but not asking these questions verbatim):

1. Did H&S move the community toward a common vision? What techniques and tactics were most effective? Least effective? Why? How did storytelling, resident connections, linking culture and place [the humanities] show up in this effort?

2. This is a project of the PA Humanities Council. How (if at all) did H&S change your perceptions of PA Humanities and/or the "humanities"?

3. What other partners, agencies, and funders do you think might join in expanding the initiative in Pennsylvania? What's the best way to help Heart & Soul appeal to those partners?

4. Did you see H&S activities making a concerted effort to bring new and different community voices into its processes? What were those voices? How successful was H&S at inviting and sustaining new voices?

5. Consider the types of resources H&S tapped into and sought to increase. Probe for or offer quick way of thinking about assets: natural, cultural, human, social, political, financial, and built. To what extent did Williamsport's existing and needed assets influence the H&S project? Its successes? Its challenges?

6. What changes have you seen? Probe for/be alert to how they thought of both assets and deficits of the town before H&S and after. What does (or could) the future hold for H&S here in "W, C, M"? What advice would you give to the leadership team and PA Humanities?

CLOSING – 5 minutes

• Give thanks

• Next steps

• Follow-up conversations