GRANTEE WORKSHOPS EVALUATION SUMMARY

2016

McCune 2016 Grantee Workshops
Evaluation Summary
September 2016

Background and Objectives

The McCune Charitable Foundation hosted 5 workshops in June 2016 to understand better if and how grantee organizations see themselves as interconnected change agents within the system of nonprofits in New Mexico. All the workshops used the same format (see Appendix A). The foundation also sought to:

- Share with attendees what the foundation has learned since rolling out its 2014 strategic plan
- Create opportunities for all participants (including foundation staff) to see themselves as part of an interconnected ecosystem
- Create opportunities for participants to make the connections between their work more visible and to network across organizations and sectors
- Learn from participants the challenges and opportunities that working together within an ecosystem-like frame presents.

Two overarching questions guided the workshops:
1. How do we make the ways in which we are connected visible?
2. Once visible, how do we make these connections actionable?

In the workshops, foundation staff introduced the concept of an ecosystem as a framing metaphor for systems thinking. Fritjof Capra and Pier Luigi Luisi sum up a systems-inspired worldview in the preface to *The Systems View of Life: A Unifying Vision* as follows:

> *Evolution is no longer seen as a competitive struggle for existence, but rather as a cooperative dance in which creativity and the constant emergence of novelty are the driving forces. And with the new emphasis on complexity, networks, and patterns of organization, a new science of qualities is slowly emerging. This new conception of life involves a new kind of thinking—thinking in terms of relationships, patterns, and context. In science, this way of thinking is known as "systemic thinking," or "systems thinking . . .*
>
> *(xi-xii, The Systems View of Life: A Unifying Vision. Cambridge University Press, 2014)*

The workshops were held in Albuquerque, Santa Fe, and Las Cruces. The Foundation sent 548 invitations for the workshops with the request for attendance by executive directors, including current and past grantees. A total of 211 participants attended: 51 and 54 in Albuquerque morning and afternoon sessions respectively, 43 each in Santa Fe morning and afternoon sessions, and 20 in Las Cruces. For part of each workshop, attendees participated in break-out discussion groups. Each small group received the same prompts to discuss and had a designated scribe from within the group record their responses on large sheets of paper. Once the discussion period concluded, participants posted their responses around the room to create a gallery walk and were given time to view responses from other groups. To close out the workshop, a spokesperson from each small group shared highlights of their group's conversation with the full group, followed by concluding remarks from foundation staff.

Method

McCune staff member Allison Hagerman worked with Charla Henley and Sonia Bettez from the NM Evaluation Lab @ UNM to summarize the discussion group responses according to the following qualitative data process. First, an Evaluation Lab assistant transcribed all of the responses into a spreadsheet. Second, the team members coded each phrase by identifying its idea(s) or concept(s). Third, the team came together to reach a consensus on the codes. Fourth, the team deduced themes from the codes. The practice of coding each phrase ensured that all responses were reviewed, and the coding by multiple readers and subsequent consensus building reduced the chance that ideas were overlooked.

The team also used Wordle™, a tool for generating "word clouds" from text provided that gives greater prominence to words that appear more frequently in the source text (www.wordle.net) to illustrate the responses. Wordles were created using either the top 30 or top 40 most repeated phrases in each response, based on the number of words that went into each popular phrase, in order to increase clarity and readability.

Findings

In the workshops, foundation staff used 5 prompts to initiate conversation for small discussion groups consisting of 4-6 participants (*see Appendix B*). The first prompt sought feedback on the facilitated movement activity that was used to explore the ecosystems metaphor; the second asked groups to identify connections and commonalities related to their work; the third asked groups to identify opportunities that arise from a systems-oriented framework; the fourth asked groups to identify challenges to working in a systems-oriented framework; and the fifth asked how the groups imagined overcoming the challenges in order to make the connections they already share actionable.

While it was helpful to see how groups responded to the opening activity (see Figure 1), the evaluation team decided not to code the responses to prompt 1 because they did not aid in answering the two underlying questions at the heart of the workshops:

1. How do we make the ways in which we are connected visible?
2. Once visible, how do we make these connections actionable?

The evaluation team did, however, develop a Wordle (***see Figure 1 below***) to highlight how participants experienced the opening activity. As the Wordle below shows, participants' reactions to the opening activity ranged from feeling awkward and confused to comfortable, curious, and connected.

Figure 1. What was the ecosystem activity like for you?

* Wordle™ created from top 40 most frequently repeated phrases in prompt 1

Once the evaluation team coded and themed prompts 2-5, they identified four clear parts to the responses: **1.** Where do we stand and how are we connected? **2.** Where do we want to be? How can the ecosystem view help? **3.** What is stopping us? and **4.** How can we get where we want to be in spite of the challenges?

Part 1: Where do we stand and how are we connected?

Prompt 2 in the workshop asked participants to identify commonalities between the members of their group. Common themes from the responses centered on issues such as social justice, working towards the bigger picture, building a better state/world (creating overall change), building a larger worldview (systems thinking, systems change), and meeting community needs. Group members also mentioned a number of overlapping services and commonalities in their inspirations and motivations for working within the nonprofit sector. *Figure 2* below (Wordle re: commonalities) highlights the top 30 most repeated terms and phrases in the responses to prompt 1.

Figure 2. Commonalities

* Wordle™ created from top 30 most frequently repeated phrases in prompt 2 responses.

Part 2: Where do we want to be? How can the ecosystem view help?

Workshop participants mentioned that the ecosystems view creates solidarity within the nonprofit world, which can enhance creativity and innovation and agreed that they would like to be responsive to diverse community needs and view diversity as a resource instead of a challenge. Participants agreed on the goal of taking a more holistic approach altogether with increased awareness and more access to information and resources. They agreed that this approach would help make collective change and that there needs to be a "shift to real collaboration instead of competition" in order for transformative impact to take place. The Wordle™ image below (*Figure 3*) displays the 30 most common phrases and terms used in the workshops to answer prompt 3.

Figure 3. What do we want to achieve?

* Wordle™ created from top 30 most frequently repeated phrases in prompt 3 responses.

Part 3: What is stopping us?

In prompt 4, the foundation asked the participants what challenges they faced in achieving the big goals and desires mentioned in prompt 3. Responses reflected two types of challenges: individual and systemic. Responses included some individual challenges: turf mentality and territoriality; lack of resources; and close-mindedness/lack of creativity. Participants noted that collaboration is hard when you are not on the same page/playing field; when there are competitive conditions and disparity in resources between organizations; when there is a lack of systemic, long term support for collaboration (e.g. coordination between funding agencies, training in collaborative practices, enhanced connectivity for rural or remote areas, and opportunities to network and learn together); when there is a need for different entry points into collaboration as a result of different organizational capacities and structures; and when trust requires a structural safety net that does not yet exist (e.g. experimental funding structures, multi-year funding and formative metrics focused on learning, ways to share knowledge and experiences, etc.). *Figure 4* displays the 40 most popular phrases and words used by the organizations in the workshops. As the Wordle in figure 4 shows, it is clear that limited time, limited resources, competition, and scarcity mentality are the largest challenges faced by organizations overall.

Figure 4. Challenges

* Wordle™ created from top 40 most frequently repeated phrases in prompt 4 responses.

Part 4: How can we get where we want to be in spite of the challenges?

The focus of the responses to overcoming the challenges was perceived as mainly structural or systemic. Participants expressed willingness to participate in collaborative structures if the conditions that create a supportive environment for such practices are in place. Furthermore, establishing better conditions and supports for big-picture systems thinking would facilitate participation by organizations. One respondent stated that the "current funding structure does not allow for experimentation, conversation," which highlights the desire for a safety net that allows innovation, trying out new ways of working and taking risks when success is not necessarily guaranteed. Participants mentioned that dedicated staff time for communication and broader systems awareness would also help increase the feasibility of cross sector conversations and coordination. Incentivizing collaboration through grant making was proposed as well as a way of changing funding structures (i.e. collaborative funding, operational funding) to help facilitate systems-inspired approaches. Some participants suggested continued training on communication and collaboration as a means to overcoming the challenges, and the idea that organizations need to communicate more amongst themselves to facilitate collaboration around common goals. Participants also suggested a change in perspective from focusing on community deficits to focusing and building on community strengths. This would allow for a shift away from the scarcity mentality towards an abundance mentality, which may encourage more collaboration and capitalize on collective strengths. And finally, participants wished to have more time to plan and reflect and share learning as they go—as one response stated "time to develop work and space to decompress" is crucial to successful work. Below, *Figure 5* includes the top 30 most popular responses to prompt 5 and shows that participants were most interested in overcoming the challenges they face with time, connections, awareness, relationship building, mentorship, vision, and space for creativity and collaboration.

Figure 5. Solutions

* Wordle™ created from top 30 most frequently repeated phrases in prompt 5 responses.

Discussion and Discoveries

Through the workshops, the McCune Charitable Foundation endeavored to create spaces where participants from across the state could take time to reflect collectively beyond their day-to-day work, and start to see themselves and their organizations as part of a larger system with the possibility of achieving greater impact. In the process, diverse groups faced the possibility, opportunities, and challenges of systems thinking and began to unravel what it would take to make it possible to act within a new vision.

Analysis of the information (data) from the workshops provides the Foundation with several actionable ideas on how to go forward. Participants from the organizations appeared to understand and want to engage in deeper collaboration and appreciated the opportunity to find and strengthen their connections for more effective networking.

While they experienced uncertainty, participants also proposed ways to overcome obstacles. Organizations would value resources to "maintain house," i.e. operational funding, as well as support for structuring and facilitating platforms for continued networking and collaboration in the future.

The Foundation should also keep in mind challenges such as resource and time constraints, competition, and territoriality, when encouraging organizations to collaborate.

Overall, the workshops helped start a different and important conversation about what it will take to move towards an ecosystem where individuals and their organizations work as a cohesive system that will better serve and build on the strengths of communities in New Mexico.

Appendices

Appendix A. Workshop Outline of Activities

<div align="center">

Marshall L. & Perrine D. McCune Charitable Foundation
Grantee Workshops – June 20, 21, 23 2016

General Program Overview and Timeline

</div>

How do we make the ways in which we are connected visible?

Once visible, how do we make these connections actionable?

9:00 am or 1 pm		Workshop begins
	20 minutes	Opening Remarks
	10 minutes	Introduction of facilitators, framing of interactive activities
	15 minutes	Constellation movement – ecosystems framing metaphor exercise (participants walking in open room space, responding to cues by facilitators) and formation of small group cohorts
	40 minutes	Break-out groups pick up kits, discuss and respond to prompts
	10 minutes	Break-out groups post materials, return to seats
	20 minutes	Break-out group spokespeople share highlights or take-away from their group discussion with full group
	5- min	Closing remarks
11:00 am or 3 pm		Workshop ends

Appendix B. Break-Out Group Discussion Prompts

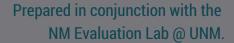
Introductions (about 2 minutes per person)

- Your name and organizational affiliation
- Next, in one or two words or phrases, describe what drives you to do the work you do—something that may be an area of concern that you have carried with you through your adult life, regardless of professional affiliation. What is the guiding purpose of how you engage your work? Why are you driven to do what you do? What gives your work meaning?
- Finally, finish your introduction with a couple of sentences on how what drives you is channeled through the work of your organization

Next, we ask you to address the following questions—and to write (or draw!) your group responses to each prompt on a separate sheet of paper, **indicating the number of the prompt at the top of the sheet**. (*Timekeepers: encourage your team to spend about 5 minutes on each question so that you get to all the questions—then, if there's time, return to those you want to deepen and expand*)

1. What was it like seeing yourself as part of an ecosystem (from the constellation experience), both as an individual and through an organizational lens? (These can be one-word responses—was it confusing, empowering, disorienting?)

2. From an ecosystems perspective, what connections and commonalities exist between your group members' driving areas of concern? How does that show up in your work?

3. What are some of the opportunities that working in the broader context of an ecosystems view create? What inspirations or ideas come to you from within an ecosystems view?

4. What are some of the challenges of working in the broader context of an ecosystems view? What stands in the way of seeing each other as part of an ecosystem?

5. What would it take (actions, structures), to keep the ecosystem in view when we return our day-to-day work? What supports are needed to make the connections we share actionable?

M^cCUNE

CHARITABLE FOUNDATION

The Marshall L. and Perrine D. McCune Charitable Foundation is dedicated to enriching the health, education, environment, cultural, and spiritual life of New Mexicans. The Foundation memorializes its benefactors through proactive grantmaking that seeks to foster positive social change.

Prepared in conjunction with the NM Evaluation Lab @ UNM.

The New Mexico Evaluation Lab @ UNM provides high quality policy research and program evaluation services to non-profit social services, health and education agencies throughout New Mexico.

Learn more at www.evallab.unm.edu/