Peer Learning Community Programs

Cost-Effective Capacity Building for Nonprofits
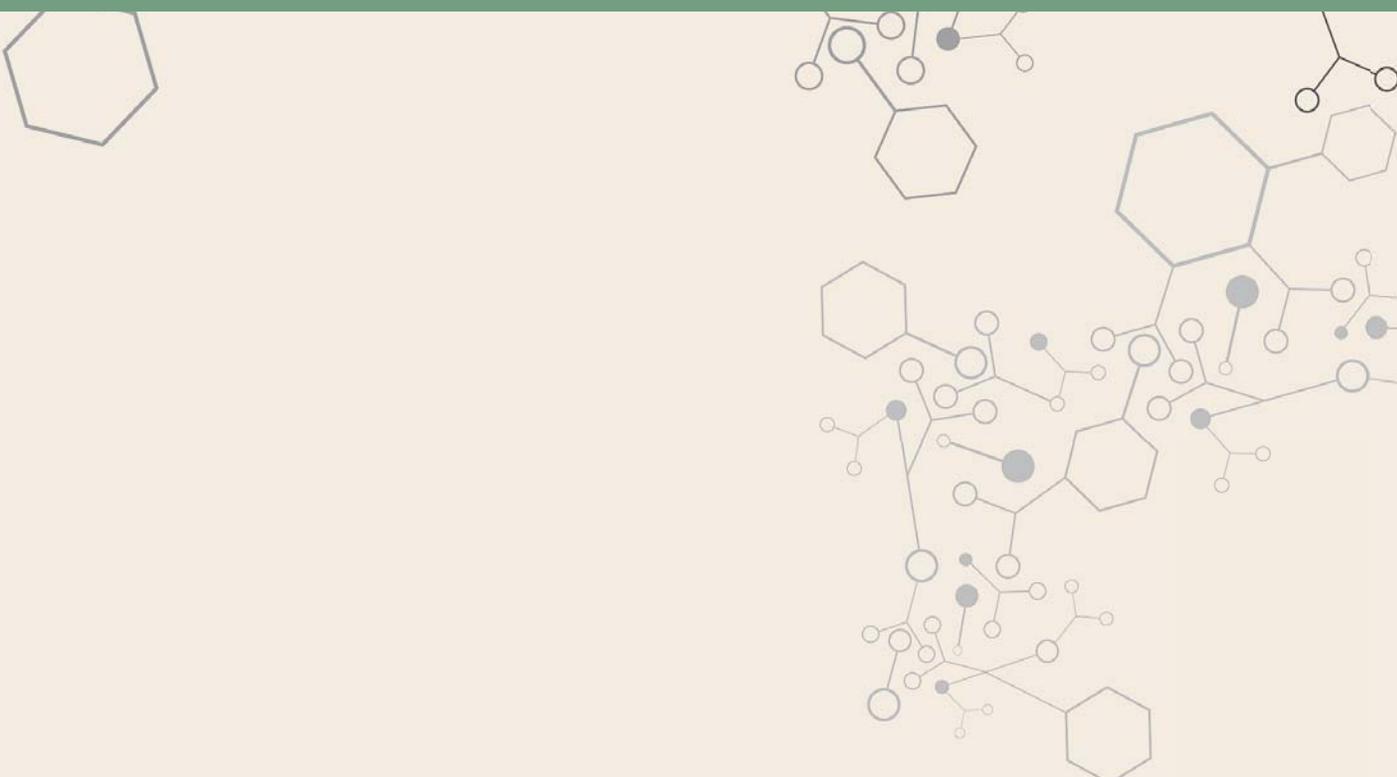
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Building Collaboration and Capacity for Change

INTRODUCTION

Are you responsible for capacity-building programs? Do you search for cost-effective ways to help your clients achieve their goals? People who provide services to help individuals or organizations improve and grow may find it difficult to design a program that is both effective and cost efficient to deliver. Traditional methods such as *workshops, conferences,* and *counseling* are helpful, but they come with limitations:

- They can be expensive to deliver, and if the costs are passed on to the client, that can limit participation.

- Keeping a client on track with the change effort is difficult.

- Everyone may have the best of intentions after attending a training or getting advice from a consultant, but finding a way to take what was learned and put it into action continues to challenge us all.

When I was the CEO of a state association of nonprofits, I researched a number of methods to help my member organizations grow and improve. Building the capacity of these nonprofits was critical: if they were unable to meet the demand for services or show effectiveness, they would lose their funding. When I discovered the concept of *peer learning,* I set about experimenting with a program design that blended training, technical assistance, and shared learning. Later, as technology improved, I employed web-based teleconferencing to increase the accessibility of the program.

I called the resulting method *Peer Learning Community Programs* and have been using some version of these programs for more than seventeen years, mostly with the nonprofit organizations I work with in my consulting practice.

For the past decade, I have helped foundations, collaboratives, and associations design and launch their own Peer Learning Community Programs tailored to their constituents. This document is my effort to share what I learned works, and doesn't work, with this method and to provide a practical program model as a place to start.

Who Gets the Most from Peer Learning Community Programs?

Good candidates for this method are:

- State associations and networks supporting the growth and organizational change of their members
- Community collaboratives educating partners on how to address social challenges
- Nonprofits working with groups of clients who want to gain skills in order to improve their lives
- Educational institutions or professional development organizations helping individuals increase their skills and knowledge
- Foundations or capacity-building organizations striving to build the nonprofit sector in their regions
- Consultants improving the skills or encouraging the growth of organizations or individuals

I have found that Peer Learning Community Programs yield some wonderful surprises. Because this program model offers greater access to learning for more participants than traditional methods, it can accelerate knowledge throughout the network more rapidly. As new peer experts emerge, it may increase a network's ability to advocate for better conditions and develop new leaders. Many times, the program model conserves capacity-building resources, particularly if participating organizations make use of technology. I encourage you to be open to the unexpected, evaluate the results, and adapt your program to the needs of the people you serve.

GETTING STARTED

First, What's the Expected Outcome?

What do you want to achieve with your own Peer Learning Community Program? Are you supporting a cadre of contract social workers in implementing a new methodology? Helping a nonprofit's group of clients improve their ability to save and manage finances? Facilitating a network of nonprofits working to improve their fundraising? The

first step is to determine the program objective. A commonly understood overall focus for the program helps everyone—participants, facilitators, and supporters—identify the desired change and work together to achieve it.

Next, Define Participation

A clear program objective, along with a set of program participation requirements, helps prospective participants decide whether they can engage in the program. A Peer Learning Community Program usually operates over a period time, at least six months, and not everyone may be able to commit to the required time. For this reason, it is key to have an *application process fo*r the program and ask each applicant to confirm an understanding of the commitment involved. Expectations should include *attendance* at regular meetings, *engagement* in discussions, and *progress* on a program work plan.

How Will You Measure Progress?

Each agency or individual in the program will create a work plan that reflects individual learning goals, so consider how group progress against that plan will be measured. Examples include:

- Are you tracking changes in nonprofit organizational capacity? You might measure change as increases in budgets or in the number of clients served.
- Are you trying to improve financial capability for a group of low-income clients? How about measuring improvements in credit scores, or money saved over time?

Having a clear program objective and agreements to track progress—both of individuals and of the group—accomplishes two things: it establishes a sense of camaraderie to support working together and it sets reporting expectations. Entities that are investing in the program, such as foundations or educational programs, will also be reassured that the program they are funding will hold itself accountable for achieving results.

Designing the Program

Once the overall objective of the Peer Learning Community Program is established and a way to measure progress in achieving that objective is in place, it's time to design the program. Be sure to include the following:

> ### Key Elements of a Successful Peer Learning Community Program Design
>
> A. *Training* to give everyone the same critical information needed to create the change
>
> B. *Individual work plans* to make the learning relevant, including goal setting and action plans
>
> C. *Regular meetings* with peers to learn more about the change issue, share resources, support everyone's efforts, and be accountable for work plan progress
>
> D. *Archived resources* for ready reference by learning community team members and new learners entering the program
>
> E. *One-on-one technical assistance* to support the implementation of the work plans

A: Training

A training session on the learning topic gives everyone a baseline understanding of it, including what action will be needed to make the desired change. It's ideal to have this initial training in person so program participants can build rapport and see where there may be synergy in their desired program goals. A well-facilitated training employs individual and group exercises to encourage discussion and sharing of experiences; it's natural for participants to volunteer suggestions when someone

Case Study: A Peer Learning Community Program for a Nonprofit Serving a Rural Community

To increase the organizational capacity of nonprofit organizations located in a rural county of Northern California, the local Community Action Agency (CAA), sponsored a Peer Learning Community Program that featured:

- A one-day training on developing a One-Page Business Plan for Nonprofit Organizations[*]
- Technical assistance to develop the resulting plans
- Monthly web-based meetings that included webinars and shared peer expertise

Each program spanned nine months and was repeated with a new group of nonprofits over a period of three consecutive years. The results included an *increased capacity* to serve the low- and moderate-income population of the region, *increased engagement* in the goals of Community Action and *greater collaboration* among nonprofits. One surprising result was that the nonprofits decided to form their own local nonprofit network, which continues to meet monthly.

[*]Jim Horan, *The One Page Business Plan* (Berkeley, CA: The One Page Business Plan Company; PAP/COM edition), 2015

else describes his or her challenges. It will soon become apparent which individuals have expertise to share and are willing to help others. These people may be good candidates to highlight during regular meetings by sharing their experience and leading discussions on "lessons learned."

If the initial training cannot be conducted in person, an option is to use a web-based platform that allows on-camera introductions and participation. During this initial training when everyone meets, it's important to create an environment where people can get to know each other, establish trust, and feel comfortable speaking the truth about what they are experiencing. Setting a meeting tone that allows confidential sharing of experiences helps the participants become open to accepting help from peers.

An early discussion of agreements on how to work together sets the stage for sharing. What follows is a recommended set of agreements for a Peer Learning Community Program:

- Keep discussions confidential
- Help each other
- Notice synergy
- Participate fully
- Encourage experimentation
- Connect and share
- Make progress on the work plan

A word about providing training …

Considering the resources needed to set up a training on a change issue, it is reasonable to conduct it for the entire network of organizations and individuals and *then* offer a Peer Learning Community Program for those attendees who are able to make the time commitment to do deeper work on the issue. Generally, it is important to make attendance at the baseline network-wide training a prerequisite to participating in peer learning.

B. Individual Work Plans

Everyone starts from a different place and has different priorities for how to apply peer learning. Some participants will be miles ahead in knowledge or experience while others will just be starting out with the topic. It's better to have a mix of experience in a Peer Learning Community Program rather than try to segregate the experienced from the newbies. Even beginners have insights that benefit the more experienced participants; people who are new to a change issue often bring a fresh perspective that old hands need to hear.

Regardless of where everyone is starting from, each participant should create a program work plan that includes goals and action steps relevant to the learning topic and in line with their personal priorities or organization's plans. Tailoring the learning

to the needs of the participants in this way provides the motivation to stick with the program and make the desired change. It's fine for the trainer or program facilitator to suggest goals and action steps, and this can be done with a "cheat sheet" to prompt brainstorming on how to apply the learning. But the *work plans must advance the goals of the participants.*

The work plan time frame should be the same as the Peer Learning Community Program period. This creates a little pressure to encourage the participants to keep on track and be accountable for their progress during the program. A work plan covering a longer time frame than the program period reduces the urgency to complete the work plan goal.

A work plan should include *a simply stated but measurable goal with several achievable action steps.* There are various methods and templates available for goal setting; for other participants such as individuals or nonprofits, a simple work plan template will suffice. Be sure to provide the template with instructions so everyone is working with the same process. For an example of a work plan template, see page 15 at the end of this document.

When to assemble the work plan

After the initial training, Peer Learning Community Program participants will need help putting the work plan together, ideally with feedback from their peers. There are several ways to accomplish this:

- *At the end of the baseline training, set aside time for the participants to get information on how to assemble the program work plan, including an overall change goal and concrete action steps.* If more than one staff member is attending from a single organization, the group can work as a team and produce a draft work plan together. Then each organization's team can report on their draft work plan and get feedback from other training participants.

- *If there isn't time to add a work plan development segment to the initial training, provide a document* containing a menu of recommended goals and action steps. Ask those who want to participate in the Peer Learning Community Program to select their priorities, and have them include the document along with their program application. Participants can then get feedback from their peers during the first regular meeting of the Peer Learning Community Program.

- *After the original training, but before the first regular meeting of the Peer Learning Community Program, provide individual counseling to each confirmed program participant to help draft a program work plan. Participants can then get peer feedback on their work plans during the first regular meeting of the program. Note: this method does carry the added cost of a consultant meeting one on one with each participant rather than developing the work plan in a group setting.*

It is important to have the participant work plans in hand in advance of the Peer Learning Community Program's first meeting. The program facilitator or trainer will gain an understanding of the priorities of the participants regarding the change issue and have the information to determine the topics for the regular meetings.

C. Regular Meetings with Peers

The purpose of regular Peer Learning Community Program meetings is to foster the achievement of work plan goals. These meetings allow for in-depth information sharing and keep the change issue front and center as the participants implement their work plans. You can accomplish this through a meeting program that provides:

- Additional training on issues related to the change topic (as determined by the participants' work plan priorities)
- Opportunities to discuss the topic with peers and learn from their experience
- Resources, templates, samples, and recommendations from peers and program facilitators to solve challenges related to the change topic
- Accountability for completing the work plans
- Relationship building so peer participants can work together after the program is completed

Frequency, Length, and Format of Meetings

Monthly meetings of about ninety minutes are manageable for most participants and allow time to make progress on work plan action steps. If the meetings are held less frequently than monthly, work plan progress can slip as a priority.

If program participants are located near each other, face-to-face meetings may be preferred, but web-based teleconferencing is convenient and allows more people to participate.

How Many People Should Meet?

If Peer Learning Community Program participants are organizations such as nonprofits or small businesses, it is preferable to get as many people as possible from each organization to listen in on the program; web-based teleconferencing supports that. Instead of having one person from the organization attend the meetings and try to lead the change effort alone, multiple staff, volunteers, and board members can learn together, discuss what they learned, and work as a team to bring about the change. During regular meetings, however, it's best if one person acts as the spokesperson for each participating entity, providing updates and reporting on work plan progress.

The number of overall participants attending regular meetings will affect the meeting dynamics. A program of *eight to twelve participating is ideal*. If there are too few (under five) individuals or organizations enrolled, one or two being absent during the discussion and resource sharing will limit the group's effectiveness. But the same thing happens if there are too many (more than fifteen) participating. Some people might not get an opportunity to speak, and some may listen passively rather than engage in the discussion.

Elements of a good Peer Learning Community Program meeting

An effective and satisfying meeting will have the following elements:

- A check-in to describe any updates or new situations concerning the participating organization or individual
- A short training with a question-and-answer segment that covers one of the topics the participants' work plans have identified
- A discussion on the topic that could include a peer-presenter describing what she or he has learned about that issue
- An update on each participant's progress with the program work plan

Expert Presenters

While in-person trainings can be limiting because of travel and participation costs, web-based meetings allow experts to attend the peer learning community program meetings at low or no cost. Many experts are willing to share their knowledge at no or low cost if they can avoid travel and use technology such as webinar platforms. Desktop sharing platforms such as Skype, GoToMeeting, and WebEx allow experts to be present in real time and share slide presentations, web-based research, and documents. Be sure to record the meeting for participants who are unable to attend or want to refresh their knowledge by reviewing the recording.

Peers as Experts

While access to experts through web-based teleconferencing is an important part of a Peer Learning Community Program, a highly valued benefit of the meetings is the opportunity to hear from peers about how they are tackling the change issue. At first, peer participants may be reluctant to position themselves as experts "teaching" their peers, but their hesitation can be overcome when they understand that others will learn from their experiences, whether they were successful or challenging. A program facilitator can ask peer presenters to:

- Describe what they learned from a resource, such as a workshop or a book on the topic
- Share their experience, experimenting with solutions and trying new strategies

The Importance of the Peer Learning Community Program Facilitator

An effective program facilitator will do more than lead meetings. Ideally, the facilitator will have some knowledge of the change issue: enough to identify experts and resources, help with work plan development, and coach peer learners to help each other. If one person cannot fill this role, utilize both a program facilitator and a content expert—someone with specific knowledge of the topic.

An effective Peer Learning Community Program facilitator will notice when a participant seems stalled or is not engaged. If individual technical assistance is part of the program, one-on-one meetings with the facilitator or content expert can encourage work plan progress and help get a participant "unstuck." Regular check-ins with

individuals are important, along with ongoing communication to keep the work plan goals a priority.

Don't Forget the Housekeeping

There are logistics to consider, such as meeting reminders, meeting follow-up, and archiving resources for future access. Attending to these key details is critical to the success of any Peer Learning Community Program.

Encouraging Communication Among Peer Learners

Though program facilitators and content experts have much to offer, most participants welcome the opportunity to learn from each other. They appreciate hearing about their peers' experiences and benefit by connecting outside the meetings to mull over what they have learned, ask questions, and help each other. Listservs such as Google Groups and social media platforms such as Facebook are highly effective ways to facilitate a Peer Learning Community Program's interconnectivity. Avoid any process that makes the program facilitator the hub of communication among the participants. Instead, encourage people to connect with each other outside the program. This will deepen relationships and solidify the development of a network of learners who are willing and able to help each other after the program is complete.

D. ARCHIVED RESOURCES FOR READY REFERENCE

One of the challenges for Peer Learning Community Programs is capturing the information shared during meetings and ensuring that it remains accessible after the program ends. With the staggering flow of information available now, it's easy to become overwhelmed. Because of advances in technology, experts are more accessible through their own blogs, online documents, and websites than they used to be, but this expertise does little good if participants can't find the information when they need it. A Peer Learning Community Program can devote a webpage to the learning topic or use a cloud storage platform such as Dropbox to capture the resources, websites, and research publications that are shared during the program period. This information, along with recordings of the Peer Learning Community Program sessions, should be archived for people who join the network and as refreshers for the participants.

Case Study: California's CAA Asset Building Learning Cluster

Over a two-year period, a state agency administrating federal Community Service Block Grant funds awarded grants to a category of California nonprofits called Community Action Agencies. These grants could be used to expand programming to help low-income individuals prepare their taxes, collect their Earned Income Tax Credit (EITC), and become more capable of managing their finances. In addition to awarding these grants, the state agency also gave the state association of CAAs a grant to operate a Peer Learning Community Program to support the successful implementation of the individual grant projects. These projects were varied and included developing a regional coalition in support of financial capability, adding a financial literacy program for Head Start parents, and integrating financial education into a job training program. Each of the participating agencies received:

- Individual technical assistance in the development of a grant project work plan

- Training and technical assistance from experts in the field of financial capability and EITC programming

- Peer Learning Community Program meetings conducted by teleconference and in person to share learning and account for work plan progress

In addition to the successful implementation of the grant projects, this effort sparked an *increase in CAA staff knowledgeable of EITC and financial capability programming.* As a result *new peer experts* in the network were available to mentor others. For example, the following year, one CAA staff that had been successful in implementing an EITC program worked with the state association to develop and deliver a set of four webinars on operating a successful EITC program. Other experienced CAA staff provided training at conferences and technical assistance to peers on an informal basis. And there were additional beneficial outcomes: the development of *regional coalitions* led by CAAs and the *formation of a statewide collaborative* supporting financial empowerment for low-income families. These are great examples of the unexpected outcomes that can directly result from a Peer Learning Community Program.

As I mentioned earlier, one of the benefits of a Peer Learning Community Program is its cost effectiveness. Funders appreciate the fact that the program design leverages the wisdom of experts and peer learners and creates an ongoing learning community that operates on its own after the program period is complete. Access to individual technical assistance during the program is helpful, particularly if a participant needs extra help or seems overwhelmed with the task of making progress on the program work plan. Not all program contracts allow for this expense of one-on-one consultations. If not, a drop-in clinic can be added to the end of meeting for those who have additional questions for the program facilitator or content expert.

Evaluating Your Peer Learning Community Program

You need to evaluate a Peer Learning Community Program at three levels:

1. **Participant level**: Did the individual or organization make progress with the work plan?

2. **Program level**: Did the Peer Learning Community Program effectively facilitate change for the organization or individual?

3. **System level**: Did the individuals or organizations improve the network or community because of the change?

The Benefits of a Reflection and Program Graduation

Conducting a special session called a "Reflection and Program Graduation" at the last meeting gives participants a chance to take note of how far they've come during the program period and experience a sense of accomplishment. Reflecting in this way is very motivating for the participants who have been diligent and accountable in making progress. The last session can also provide the space to consider what goals and action steps can be put in place for the future. A simple narrative report

noting what was accomplished may be enough to evaluate whether the participants made progress on the work plan.

Whether the program itself was instrumental in helping participants make that progress can be determined through a survey measuring degrees of satisfaction and capturing comments about what worked and didn't work within the program. This feedback can inform program improvements.

As I recommended earlier, it's helpful if the participants initially agreed to capture the same type of data that might indicate change in the community or within a network or system. For example, if a group of nonprofits attempted to increase organizational capacity to serve more clients, capturing data on increases in the number of clients served will demonstrate a change that benefits the community. The program might report that "Ten of the twelve participating nonprofit organizations increased the number of clients they served by 35 percent or more." If the Peer Learning Community Program worked with individuals striving to improve their financial situation, a before-and-after measurement may report, "Ten of the twelve individuals in the Financial Capability Learning Community Program increased their credit scores by fifty points or more."

Summary

Leading a Peer Learning Community Program can be extremely rewarding for any trade association, state association, foundation, intermediary, nonprofit, or consultant hoping to improve the capacity of the individuals or organizations they serve. Facilitating group learning creates a network of individuals or organizations that have worked together and succeeded in achieving their goals. I think you will find the trust and camaraderie established during your program will perpetuate a culture of continuous learning that will benefit the community long after the program is complete.

KEY ELEMENT	YOUR ANSWER(S)
What ideas came up during the training that are worth considering for experimentation?	
Based on what you have learned, what do you need to add, eliminate, or improve?	
Create a **"SMART"** goal to complete during the program period.	
Identify four to six action steps that will help you achieve the goal. Be sure to include who will do it and by when. How will you be accountable for this work plan progress?	1. 2. 3. 4. 5. 6.

Setting SMART Objectives

SMART objectives refers to an acronym built around the key characteristics of meaningful objectives, which can be very helpful in evaluating the quality of programs proposed and carried out.

SPECIFIC—Objectives should specify what they want to achieve (concrete, detailed, and well defined).

MEASURABLE—You should be able to measure whether you are meeting the objectives or not (numbers, quantity, comparison).

ACHIEVABLE—Are the objectives you set achievable and attainable?

REALISTIC—Can you realistically achieve the objectives with the resources you have?

TIME—When do you want to achieve the set objectives?

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Catherine Marshall builds the capacity of nonprofits to achieve their missions. Since 1982, Ms. Marshall has served nonprofits, first as a volunteer and board member, then as a founder and executive director of her own nonprofit. For nearly ten years, she served as CEO of CAMEO, an association of nonprofits providing microenterprise development in California. While at CAMEO, Ms. Marshall provided capacity-building services to over one hundred microenterprise nonprofits. Ms. Marshall has been recognized for her innovative approach to nonprofit capacity building with the "virtual peer learning cluster" method for practitioner development. Building on her experience developing coalitions, associations, and learning communities, Ms. Marshall works with funders, nonprofit associations, and collaboratives to design and deliver innovative and effective capacity-building programs for nonprofits. Catherine Marshall holds a B.A. in Psychology and an M.A. in Organizational Psychology. She is the author of *Field Building: Your Blueprint for Creating an Effective and Powerful Social Movement,* available through independent and online bookstores. For help launching a Peer Learning Community Program of your own, contact Catherine Marshall at cmarshall@capuilders.org.