

The Change Collective: A Learning Brief

Lessons about Changing Human Service Practice
through a Collaborative Learning Process



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Prepared by: Melissa Innes
MPI Associates
melissa.p.innes@outlook

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The Alex
Aspen
Big Brothers Big Sisters of Calgary and Area
Boys & Girls Clubs of Calgary
Burns Memorial Fund
Calgary and Area Child and Family Services
Calgary Fetal Alcohol Network
Calgary John Howard Society
Calgary Sexual Health Centre
Carya
Catholic Family Service
Hull Services
Parent Support Association
United Way of Calgary and Area
Woods Homes

Contact

For more information about the Change Collective and related tools and resources, please contact Michelle Clarke at Burns Memorial Fund (michelle.clarke@burnsfund.com)

1.0 INTRODUCTION

In recent years social labs, communities of practice, design labs and other types of learning communities have emerged as important vehicles to support innovation in human service (Hassan 2014). When appropriately designed, resourced and supported, these learning collaboratives bring together key stakeholders to examine complex social issues and explore new ways of thinking and practice. (Kieboom 2014; Wenger-Trayner 2011). The Calgary-based *Change Collective* is an example of such a collaborative.

Over the course of three years (June 2014 – December 2017) this learning initiative, designed to support practice change among youth-serving professionals, consistently engaged its members, enabled collective learning and reflection, developed innovative principles to guide stronger practice, and produced a Practice Framework that is being taken up by professionals across Canada. Although there were many challenges, the Collective was successful in initiating a broad-based shift in practice among frontline professionals across an entire sector.

1.1 METHODS

This learning brief is based on findings from a developmental evaluation of the Change Collective. The information presented here is drawn from:

- Interviews with Change Collective members, Change Collective conveners and the facilitator
- Field notes
- Resources related to adaptive learning
- The evaluator's own reflections on the process

1.2 PURPOSE of this LEARNING BRIEF

This brief highlights lessons from the Change Collective experience. It aims to inform other efforts to design and sustain collective learning ventures to support practice change. The conveners of the Change Collective hope that documenting and sharing these experiences will help to support renewed commitment and dedication to collective learning as a vital component of social change.

2.0 WHAT HAPPENED – Overview of the Process

In 2013, as part of broader human service sector efforts to connect vulnerable youth to social supports, the United Way of Calgary and Area, Burns Memorial Fund and the Institute for Community Prosperity at Mount Royal University¹ agreed to fund and convene a learning initiative – the Change Collective.

¹ The Institute participated in the initial design of the Collective but did not continue its involvement into years 2 and 3.

The overall aim of the Collective was to *increase the sector's capacity to enhance youth connections to natural supports* and it was structured around a guiding question - *How does the way we work (as individual practitioners, organizations, and as a sector) enhance or impede youth connections to natural supports?*

Longer-term outcomes were defined at the outset to include:

1. Shift practice among participants and increase their capacity to enhance youth connections to natural supports
2. Identify individual, organizational and systems level barriers to enhancing natural supports
3. Document promising practice and develop a Practice Framework for enhancing natural supports for vulnerable youth²

The Collective was originally comprised of frontline and supervisory staff from 13 Calgary-based, youth-serving non-profit organizations³ and representatives from each of the funding bodies. The initiative was supported by a facilitator and a developmental evaluator.

Although not an explicit part of the original design, the Change Collective unfolded in three phases (design, implementation and handover to community), with each phase helping to set up the next phase for success.

2.1 DESIGN PHASE (6 months)

Significant effort went into the design of the Change Collective. A conveners' group⁴ worked to ensure that participants and their organizations could meaningfully contribute to that design and understand the commitment involved. The following strategies proved effective in designing a successful process.

Agency and participant selection process

The conveners worked with the facilitator, the developmental evaluator and other professionals with experience designing and supporting social labs to develop a basic outline of the learning collaborative process. This was written up and shared with agencies in Calgary's youth-serving sector who were then invited to submit expressions of interest (EOI) based on explicit guidelines. These EOIs were reviewed against criteria developed by a committee, and

² Please find a copy of version one of the framework at <http://www.burnsfund.com/wp-content/uploads/2017/02/CC-Natural-Supports-Framework.pdf>. A second version is in production and will be available for distribution in the spring of 2018. This expanded version incorporates learning that took place in year three and an additional section about engaging natural supports.

³ Change Collective members included staff from The Alex, Aspen Family, Big Brothers Big Sisters, Boys & Girls Clubs of Calgary, Calgary and Area Child and Family Service, Calgary Fetal Alcohol Network, Calgary John Howard Society, Calgary Sexual Health Centre, Carya, Catholic Family Service, Hull Services, Parent Support Association, and Woods Homes.

⁴ The conveners group was comprised of the funding agencies, the Change Collective facilitator and a developmental evaluator. We met monthly for the duration of the initiative and more frequently during the design phase.

agencies were selected. Successful agencies were notified and provided with details about the process and the commitment they would be required to make. The conveners knew having the right people in the room would be essential, so they asked agencies to select two staff (a frontline practitioner and a manager/supervisor) with the qualities of an innovator – curious, reflective, humble, comfortable with ambiguity, and with the ability to think critically and strategically.

Participant Interviews

The Change Collective facilitator interviewed each of the organizational representatives (later known as the Change Collective members) to understand more about their expectations, strengths, fears and abilities related to this and other learning initiatives. This engagement process was instrumental in helping to surface and prepare for challenges that might emerge. It built early commitment to, and ownership of, the Collective among the participants, and ensured its structure was realistic and aligned with participants' abilities to take part.

Communication materials

The facilitator/conveners also developed key communication products⁵ to share with participating agencies and others in the sector. These concise documents helped to build collective understanding of the purpose and structure of the initiative and bolster organizational support for staff involvement. The conveners were explicit upfront about the ambiguous and challenging nature of the work while providing clarity and structure to the process.

2.2 IMPLEMENTATION PHASE (2 years)

The implementation phase of the initiative took place over two years and involved 13 agencies, 25 professionals, a facilitator and a developmental evaluator. It was structured around three main components intended to support learning and practice change among Change Collective members.

Facilitated learning days

Change Collective members were brought together consistently⁶ for full-day facilitated sessions designed to support collaborative learning and reflection related to supporting youth to connect to their natural supports. These learning sessions surfaced and captured new ideas, observations, opportunities and constraints arising from action research conducted by members between learning sessions (described below). Case studies, facilitated discussion, videos and guest speakers were used to support discussion and create opportunities for

⁵ An FAQs document, an overview document, commitment letters to agency leaders and Change Collective members were developed and shared.

⁶ During the first-year learning days were held quarterly. In the second-year members requested increased frequency in the gatherings and met every two months.

members to enhance their understanding and strengthen their skills related to youth and natural supports. Ideas that emerged were consolidated into a set of provisional principles and the group worked to develop a ‘practice framework’ intended to capture what was being learned about how to change practice to enhance youth connection to natural supports.

Independent practice groups

Change Collective members were organized into practice groups of five or six people who met at least once between each learning session. Although these groups experienced several challenges (inconsistent participation and commitment, difficulties self-organizing, poor documentation of sessions) and were not overly successful in generating insights and strategies, they were important in providing mutual support, breaking down organizational silos and promoting trust and cohesiveness among Change Collective members.

It can be challenging to bring together a group of peers from across several organizations without some sort of external support. Often, people in the group feel uncomfortable giving direction and as such, dialogue can devolve, and emerging insights and ideas are not well documented. The practice groups would likely have been more productive if they had received some sort of facilitation or developmental evaluation support.

Assignments between learning sessions

In addition to the practice groups, ‘homework’ was assigned by the facilitator after most learning days. This was typically in the form of reading and/or viewing assignments, as well as direction to apply the emerging principles in their everyday practice and reflect upon and document their experiences. This process of experimentation and reflection (action-research) was essential to expanding and grounding the group’s learning in practice and supporting further development and refinement of the natural supports principles.

By the end of the second year, the learning from the Change Collective had been consolidated into a formal document – *the Natural Supports Practice Framework*. This Practice Framework became the foundation for the handover phase and the training of other professionals across Calgary’s youth-serving sector.

2.3 *HANDOVER PHASE (about one year)*

With the completion of the Practice Framework, the Collective continued to evolve. The focus shifted from learning and practice change within a small and tightly defined group, to knowledge translation and capacity building among other professionals and organizations in the sector. There were four main elements of this phase.

Tools to Support Uptake

The facilitator and developmental evaluator worked with sub-committees of the larger collective to develop training materials and an organizational audit to accompany the Practice Framework. These tools were used to deliver training to other professionals within Change Collective organizations and to other organizations across the sector. They were also used as the basis for presentations at conferences and other learning events across North America.

Ambassadors

At least one member from each agency took on the role of co-facilitating the training within their organization. The facilitator delivered train-the-trainer sessions with these ambassadors and the ambassadors have subsequently brought the training to their colleagues and helped to apply the principles in their specific organizational context. This work has helped broaden the impact of the Change Collective well beyond its original members.

Broader Community

The Change Collective was reconfigured during the third year into a broader community of practice where participation is entirely voluntary and only dependent upon completion of the two-part natural supports training.

The community of practice (COP) continued to have an explicit two-fold purpose: 1) To further test the principles and support the development of an improved version of the Practice Framework and the trainings, and 2) To continue to build motivation/support to engage in an approach that is ahead of many of the systems and structures that comprise the social sector (e.g., policies, procedures, caseloads, funding mechanisms, etc.).

The COP was facilitated by the original facilitator and supported by the DE. By early 2018, the group had helped to develop version 2.0 of the framework, improved the training materials and was ready to be led by one of its non-profit members.

Handover and On-going Support

The conveners identified an existing agency to take on the stewardship of the newly configured community of practice and to continue to deliver the framework training to other agencies and systems level professionals. This agency received three years of funding from one of the original conveners to ensure the approach becomes community-owned and institutionalized.

3.0 WHAT CHANGED – Outcomes from this Learning Collaborative

It is too soon for any conclusive evidence that the efforts of the Change Collective have had a positive impact on the lives of vulnerable youth – gathering data that verifies this kind of change will take several years and requires changes to what gets measured and how. However, dialogue with Change Collective members, other professionals, organizational leaders, systems leaders, funders and academics suggest that this learning initiative has helped to change thinking and practice on many fronts. Evidence of these changes includes:

- Training of more than 450 social service professionals in the Calgary area. Three Calgary-based organizations have trained their entire staff teams using the practice framework.
- Self-reported changes to frontline practice with youth and natural supports among professionals who took part in the Collective and/or have taken the natural supports training.
- Self-reported changes in management and supervisory practices among members of the Collective and others who have taken part in the natural supports training.
- Changes to organizational policies, procedures and strategies. Eight organizations have made changes to recruiting, hiring, training and supervision practices; created program procedures that are more inclusive of natural supports; and are reviewing existing policies and procedures through a natural supports lens and the use of the organizational audit.⁷
- Changes in funding practices that include the identification of new investment priorities and request for proposal processes that request the adoption of a natural supports approach as part of the proposal requirements.
- Uptake of the Practice Framework among youth homelessness prevention initiatives nationally.
- Creation and funding of public policy fellowships to advance public policy related to relational stability for vulnerable youth. These Fellows will use the Natural Supports Practice Framework as a point of departure for their research.

⁷ An audit was developed with support from Change Collective members to enable organizations to undergo a structured review of their policies, procedures, culture and values in relation to the natural supports approach. This audit can be found at <http://www.burnsfund.com/wp-content/uploads/2018/03/Enhancing-Natural-Supports-Organizational-Audit.pdf>

Perhaps more important than these specific examples of change that can be attributed, at least in part, to the Change Collective, is the wide-spread change in perspective across the sector. At working groups, team meetings, strategy sessions, case conferences, policy discussions and human service conferences, people are talking about the importance of connection to natural supports for improved outcomes among vulnerable youth.

Interviews with Change Collective members and discussions with others in the sector suggest that a growing number of professionals are examining conventional practice and identifying how these practices often undermine these connections. People are using the principles set out in the Practice Framework to challenge the status quo and work with their colleagues and leaders to create and support alternative practices and policies – practices and policies that help youth to find and connect with important family and friends so that these youth can be less reliant on professionals and more able to become healthy and resilient adults.

4.0 KEY LEARNING

The experience designing, supporting and transitioning a collective learning process was rich with lessons. Documenting this learning in this brief is intended to help to inform other efforts to support learning and practice change in human service.

4.1 FRONTLOAD THE EFFORT

Don't underestimate the effort required at the front end. The planning, development and design of the Change Collective took almost six months of work before the first learning session was held. Actions that were instrumental in setting the stage for success included:

- *Assessing readiness and appetite in the sector.* In the years leading up to the Change Collective, the United Way and Burns Memorial Fund supported community consultations and four pilot projects to understand more about existing skill and will in the youth-serving sector to enhance connection to natural supports. These efforts generated interest among professionals and helped to prime the pump for the Collective.
- *Developing and sharing concise communication materials with potential participants about the purpose, process and intended outcomes of the initiative.* One pagers, an FAQ document, an information session, and expression of interest (EOI) guidelines all helped to ensure people knew what to expect and what was expected of them in the Collective.
- *Thoughtful selection of participating agencies and participating individuals.* The conveners reviewed EOIs against criteria and provided guidelines about the type of professionals that would be the best fit for the process.

- *Interviews with individual participants to inform the design.* The facilitator met with individual agency participants to surface preferences, assumptions, fears and challenges. These not only supported a collective design process, they also signaled that responsibility for the Change Collective was shared - residing with the members, and not with the facilitator or the conveners.

4.2 BE PATIENT AND HAVE REALISTIC EXPECTATIONS

The funders supporting the Change Collective understood that practice change is a long-term endeavour and had the capacity to fund accordingly. They accepted the developmental nature of the learning process and were willing to move into unknown territory without typical funding mechanisms such as logic models, targets, fixed outcomes and annual project level reporting.

For two years they funded learning sessions where accountability was based on learning deliverables rather than tangible, measurable outcomes. They understood that sustained practice change is not achieved through one-off trainings but requires the unpacking of values and assumptions that perpetuate the status quo. Although at times this was uncomfortable, the funding agencies trusted the process and the participants, and remained committed. The funders were also willing to fly under the radar. They created space for the Collective to begin quietly, giving the group the opportunity to test ideas and develop provisional principles without too much scrutiny. Eventually the proposed approach was tested and consolidated into a meaningful framework, ready to share with leadership, other agencies and other funders.

Finally, the funders supported the process for more than three years and through all three phases – design, implementation and handover. This longer-term commitment enabled the members to engage in deeper learning and adaptation, consolidate this learning into a product, share this product with others, gain momentum and build capacity for community-based ownership.

4.3 FIND A GIFTED FACILITATOR

Although ownership of the process was shared, the Change Collective received extensive support from a strong facilitator. Characteristics of the facilitator and specific techniques that contributed to the Collective's success included:

- Being adaptive and responsive to the needs of the group and open to ideas and learning that emerged – she did not have an agenda.
- Bringing in readings, videos and ideas from a wider set of resources. The facilitator did not rely exclusively on research and models from human service. Rather she introduced members to thinking from medicine, anthropology, political science, philosophy and history to help stimulate creative thinking and alternative possibilities for youth-serving practice.

- Orienting people at the start of each learning day – reminding members of purpose and position in the process.
- Building capacity for productive reflective practice – developing skills to critically reflect upon one’s own practice was central to the learning (and unlearning) process and provided the content for the development of principles to guide new practice.
- Positioning individual experiences and learning into a broader context – making explicit the implications of ideas that were emerging in the group.
- Challenging conventional thinking respectfully.
- Making sense of, and consolidating, divergent conversations, and reflecting key concepts back to the group for validation and refinement.
- Creating a safe space and managing group dynamics so that all members could contribute.

4.4 *CREATE A COHESIVE AND CONDUCIVE ENVIRONMENT*

There were several elements in the design and structure of the learning sessions that helped to create an environment where people could be vulnerable and candid enough to genuinely examine status quo practices.

- Membership was closed and turnover well managed. People could not come in and out; the same people were expected to attend each session and consistent attendance was strongly encouraged. However, staff turnover is high within the sector. To mitigate the effects of this, agencies were asked to identify replacement members and the facilitator would meet with these new members before their first learning day to provide an overview of the collaborative and explain norms and expectations of membership. These meetings enabled people to understand what to expect and to transition more smoothly into the group.
- Trust was, as always, the essential ingredient. The facilitator supported exercises in the early sessions that helped to create a learning environment where people were both professionals and human beings. Members who had been involved in other learning and reflective processes shared mistakes and failures and modelled vulnerability, helping to establish this as a group norm. Expectations of members were made explicit and included:
 - taking risks/moving outside your comfort zone
 - actively seeking to surface assumptions, biases, limitations in your own mental models
 - willingness to be vulnerable enough to share challenges, epiphanies, limitations, things that didn’t work well in the sessions

- being mutually responsible for creating an effective learning environment (e.g., come prepared, participate fully, give feedback when things aren't working in the sessions)
- Sessions were scheduled well in advance and there were predictable routines and rituals in each session.
- Case studies were used extensively to ground the ideas and principles in practice. Members contributed the details of real-life case studies. These were written up and used in many settings to surface the complexity of the work and provide opportunities to compare new practice with the status quo. These case studies were instrumental in enabling members to apply what they were learning to their practice and identify tangible ways to change that practice.
- The Collective developed a 'compelling why'. Early in the process the group worked collectively to articulate why this change in practice was so important and the ways in which conventional practice was doing harm. In a sector where there are so many competing priorities, this rationale was motivating and persuasive. The 'compelling why' got people's attention and helped to build support and momentum for the work.
- The conveners predicted challenges and prepared for them. This group⁸ met regularly to debrief and plan sessions. A key part of these meetings was identifying potential challenges and constraints and working to mitigate these. For example, the group identified challenges related to turnover, lagging commitment, the self-organizing nature and inconsistent participation within the practice groups, competing priorities and organizational resistance, professional risk and leadership buy-in. Intentionally allocating time to predict challenges and points of resistance enabled the conveners' group to develop strategies to address these before they undermined or derailed the process.

4.5 WORK AT MULTIPLE LEVELS

The Change Collective focused on frontline practitioners but recognized that these professionals are situated inside organizations that are situated inside broader systems, each having its own set of enablers and constraints. The group identified and acknowledged these constraints but did not let them get in the way of change at the front end of practice. Practitioners can sometimes get so overwhelmed by what they can't change that they are unwilling to try to change anything. The Change Collective focused on what people could change in their day-to-day practice – collectively developing 'workarounds' and providing mutual support to try new things. These workarounds and small experiments with new ways of working generated much of the learning that informed the new approach.

⁸ The conveners' group was comprised of the representatives from the funding agencies (Burns Memorial Fund and the United Way of Calgary and Area) the facilitator and the developmental evaluator.

At the organizational level, the Change Collective conveners engaged leaders early in the process. These briefings mobilized organizational support for practice change and built leadership understanding of the organizational implications of the approach. The briefings gave leaders an opportunity to describe issues and opportunities from their perspective and motivated the development of the organizational audit to further enable change at the organizational level.

At the systems level, the conveners met with leaders from Children's Services and Youth Probation to discuss constraints and opportunities identified through the Collective. These meetings were important to raise awareness of the approach, find points of alignment and mobilize broader level support for practitioners in the field.

4.6 CAPTURE AND CONSOLIDATE WHAT IS BEING LEARNED

An essential lesson from the Change Collective experience is the importance of capturing and consolidating what is being learned into some sort of 'product'. The idea to develop a Practice Framework based on the insights emerging from the Change Collective was instrumental to the Collective's success for many reasons:

- Learning that emerged in each session was captured. People engaged in learning collaboratives often have ah-ha moments and describe transformative processes but if nobody is documenting this learning, it is lost. The Change Collective had a developmental evaluator whose primary role was to document issues, ideas, challenges and opportunities that emerged during each session.
- This learning was presented back to members in a tangible way. These DE notes were shared with the facilitator who consolidated the ideas into provisional principles that were presented back to members for further testing and refinement. This was enormously motivating and increased commitment to self-directed learning and practice change. Participants could see that their efforts to develop the approach made a difference and had the potential to be meaningful to others in the sector.
- Development of the framework supported a deeper level understanding of the principles and the overall approach. Members had to reflect on their individual experiences and work collectively to organize these into a set of concise principles that would be meaningful to others. This kind of action-research and experiential learning is key to practice change.
- The framework has been valuable as a knowledge translation tool – supporting increased understanding and changing practice among practitioners who were not part of the original Collective. The framework is being shared through training and other supports and is creating a critical mass of professionals integrating this approach and changing the culture of the youth-serving sector in Calgary.

5.0 WHY THIS MATTERS

It is generally accepted that learning is central to any change process. But we often underestimate what it takes to learn and specifically to acquire the kind of deeper level understanding needed to make positive change. We tend to look too quickly for solutions based upon a surface level understanding of the problem. We'd rather take up nicely packaged and ready-made toolkits that can be added to our current skill set than do the difficult work of critically reflecting on what we do and why, and how this might contribute to the problem. We tend to rely on the "train and hope" method of practice change rather than investing in deeper diagnostics and the slow and sometimes ambiguous process of *learn, act, reflect, adapt* required to change attitudes, values and behaviours⁹.

The Change Collective was successful in supporting practice change across the sector because the people participating in and funding the learning initiative were supported to understand what's required for this kind of deeper learning process. The funders and conveners were patient. They managed their expectations and the expectations of their leadership. They were deeply committed to and engaged in the work and willing to provide multiple years of funding without measurable early returns. The facilitator created a safe and cohesive learning environment, fed the group with relevant and divergent resources, surfaced biases and challenged conventional thinking, and consolidated the group's thinking into a tangible product.

A developmental evaluator documented learning and constraints as these emerged and sought feedback from members to strengthen the process along the way. Participants were committed and courageous, willing to reflect on their own values and assumptions, try new things and share their failures. They were brave enough to challenge the status quo and advocate for changes in practice with colleagues in their agencies and across the sector. Finally, many of the agencies involved have enthusiastically embraced the natural supports approach, continue to train staff and examine and adapt policies, procedures and culture that get in the way of their ability to support clients to create and maintain connection to natural supports. The process was not without its challenges, but the combined effort of all those involved helped to surface and attend to constraints so that learning and change persisted.

⁹ The ideas set out here are drawn from a presentation on adaptive learning delivered by Elizabeth Dozois in February 2018 – *Adaptive Learning by Elizabeth Dozois, Word on the Street and the Human Venture Institute.*

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