

Catalyst Initiative

Memo #4: Learning Loops

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The purpose of this memo is to provide The Catalyst Initiative team information that may be used in setting the conditions for effective learning loops in social innovation contexts. It addresses the following questions:

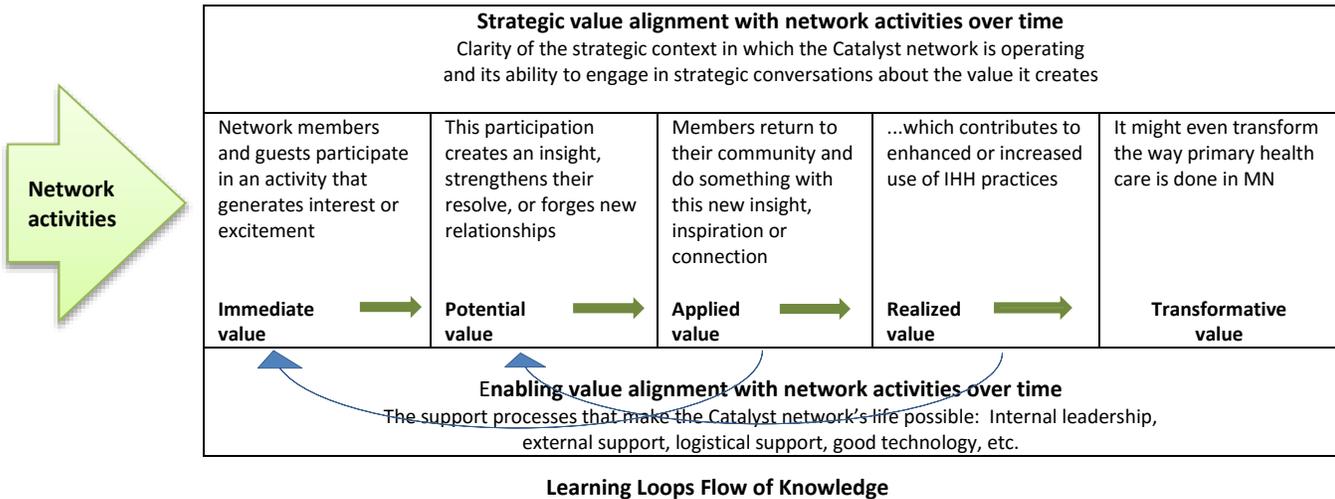
1. What is social learning in the context of networks and communities of practice?
2. What is a learning loop? How is it similar/different from a feedback loop?
3. What role do learning loops play in social learning in networks?
4. What types of learning activities do learning loops involve?
5. What are the biggest challenges in launching and supporting learning loops?

Social Learning

Social learning (SL) originated from concepts of organizational learning articulated by Chris Argyris and David Schon, Peter Senge, and Beverly Wenger. SL takes place when people learn together to advance issues of common concern rather than as a result of training. This kind of learning is typical of networks and communities of practice. For learning to be considered social learning it must:

- 1) Demonstrate that a change in understanding has taken place in the individuals involved. This may be at a surface level, e.g., via recall of new information, or deeper levels, e.g., demonstrated by change in attitudes, worldviews or epistemological beliefs;
- 2) Go beyond the individual to become situated within wider social units or communities of practice within society; and
- 3) Occur through social interactions and processes between actors within a social network, either through direct interaction, e.g., conversation, or through other media, e.g., mass media, telephone, or Web-based applications.

Beverly Wenger-Trayner and her colleagues recently put forward the framework that appears on the next page that may be adapted to represent how social learning might occur in Catalyst as a network. Each of the steps in the process creates a certain type of *value* for network members and stakeholders. As learning flows through these steps, it is important to feed the results back to new and old network members about how things work or do not work in practice. This learning does not happen in a vacuum—it takes place in a strategic context and with resources provided by stakeholders. Ongoing conversations that align *strategic and enabling value* with network activities as they change over time are a key element for sustaining learning.



Definition of a Learning Loop

Feedback is a term that comes from physics. Learning processes also use this term. For example, an action takes place—which gives a result—the originator of the action notices that result. In other words, the result of the action is “fed back.” In organizational settings feedback may refer to information flowing from one part of the organization to another or two-way open communication when two or more parties exchange information.

A *learning loop* is a type of feedback. It is a tool that helps you define how the work you do now informs what you do next. It provides a high-level perspective on how implementing social change can be broken down into a gradual process of iterative cycles.

When asked, Curtis Ogden from the Interaction Institute for Social Change in Boston, summarized his understanding of learning loops:

When I think about learning loops in our network practice I think of them in two ways: (1) as the adult learning cycle that moves from understanding of a concept, to the validation/understanding why it is important, to application, and to connection to other existing understanding; (2) the triple loops of learning for following rules, learning for changing rules and learning about one's learning.

Researchers have identified three types of learning loops:

1. Single loop learning: the quest for efficiency—doing the same but doing it better by cutting down useless practices and speeding up.
2. Double loop learning: the quest for effectiveness—doing different things that give a better result because the original thinking (theory) is not conducive to success.

3. Triple loop learning: the quest for dynamically relevant effectiveness—doing whatever it takes to always being able to assess whether we can identify what we need to do differently (applying double loop learning to double loop learning itself).

Dr. Kathy Allen, a Minnesota-based organizational consultant, differentiates feedback loops and learning loops as follows:

Feedback loops in nature are balancing and reinforcing. The reinforcing loops reinforce the behavior of the species or the interactions within an ecological system. A balancing loop would restrain or dampen down the behavior.

Learning loops bring the language of "learning" into feedback loops. When we do this, two things also happen. The feedback loop becomes more intentionally focused on learning and that learning will become more conscious and more effective in changing your actions.

The Role of Learning Loops in Social Learning

Learning loops can be a meaningful way of generating insights when it is framed and presented in a way that people understand it as an opportunity for reflection and learning. One person's story is a learning resource for the rest of the community and not a public scrutiny of whether or not a network member has done their homework.

Learning Loop Activities (some of which Catalyst is already doing)

- Providing spaces for dialogue among all partners about learning strategies that foster social learning—how to stimulate meaningful conversations, how to make “failure” an integral part of learning.
- Providing adequate time in any meeting or gathering agenda to present updates on the network activities.
- Allowing time at meetings or gatherings to share, collect and use stories of how knowledge of IHH practices have added different types of value (e.g., immediate, potential, applied, realized, transformative).
- Creating a video or print document on a particular topic that is shared with network members who discuss it in a facilitated face-to-face gathering, conference call, or online discussion. Topics are developed based on issues raised by network members.
- Sharing different approaches to achieving the same end, followed by discussion.
- Network members participating in grantee project reviews in which the value creation framework is introduced and stories are shared and collected.
- Staying on the lookout for stories that result in a particularly epic “success” or “failure” to bring back for discussion and reflection by members of the network—it might involve a “case clinic,” a debate on alternative courses of action, or an invitation to a recognized “expert” on how to address this type of problem.

- Maintaining a platform (i.e., wiki, website) to share and retrieve key documents related to events, products developed, stories, Catalyst reports, etc.

Stories provided as examples by Curtis Ogden and Kathy Allen are attached.

Challenges and Issues

Length of time required: The process of going beyond individual learning to a broader understanding situated in a community of practice can take some time to develop. For example, research about an environmental group concerned with land degradation found that social learning was documented at approximately one year, but it was restricted to an increased understanding of the problem without improved knowledge to address it. Further knowledge necessary to address the problem emerged during the third year of the program. These findings suggest that learning initiatives take about three years to develop sufficient new knowledge embedded in a community of practice to address complex problems. Learning what others have done, their struggles in doing so, and the results that transpired (possibly unexpectedly) are a powerful way to speed up the learning.

Potential for over reliance on social media: With the growing use of social media, social learning is also more and more interpreted as learning with social media—learning through open platforms like Facebook or Wikipedia or closed platforms like the Corporate Social Learning Network is growing rapidly. Most practitioners agree, however, that social learning is more than social media use.

Power and institutional barriers: Community change may be dampened if key people do not “buy-in.” Learning loops processes should target these people and engage them in key roles to legitimize various aspects of IHH. These individuals should be from the communities that Catalyst is seeking to engage. They should be encouraged to participate and take an active role in a community of practice, be recognized as taking leadership roles in their community, and be encouraged to act as helpful advisors, not directors.

Managing the tension between deference to and challenging of traditional ways of doing things: Learning and innovation live in this space. It requires a certain mindset among leaders using an agile, iterative approach and a lot of attention to data and strategic imperatives. It involves inviting people to negotiate the implications of new knowledge for their practice to move beyond “business as usual.”

Maintaining continuity: For social learning to be effective there needs to be continuity across events, continuity in strategy, and continuity in implementation. Continuity is enhanced when practices are in place to keep the coherence of the learning intact rather than looking like a series of “one-off” events. Create a summary, ideally a visual representation, of the major Catalyst strategies and publish it in places where network members can see it. Revisit these strategies at major project gatherings. Prepare and maintain a question and answer document about Catalyst, its vision, and the people who are involved. Publish brief action plans articulated by emerging networks, showing how they build on previous ones. Adopt procedures to welcome newcomers, be it participants, network members,

grantees etc. so they have a sense of Catalyst's history. Refer to recommendations by the Catalyst leadership group with partners and reflect on how they can be incorporated into future activities.

Creating incentives for sharing: Participants must move from being isolated learners to being willing to share something they are doing and then solicit provocative questions in order to build collective intelligence. This is particularly challenging when it involves a virtual platform rather than in-person gatherings. [Curtis Ogden indicated this continues to be his greatest challenge and he is still looking for ideas.]

Supporting and harvesting learning: It is challenging to take something as amorphous as a learning loop and turn it into something with more substance that fundamentally shapes practice. What does that look like in human systems? What is the eco-system that helps sustain learning as a natural and organic process as well as a conscious, intentional process in the network that you are trying to build and facilitate? Are we trying to support the form? Are we trying to support the process? Are we trying to support the eco-system?

Kathy Allen points out:

One of the fun things about nature is that nature is always experimenting. There are millions of beta tests going on every single day and nature has this process of letting go of anything that isn't working and replicating what is working. What does that process look like in a human system? Meaning within a whole system emerges when you get a lot of different people to share their unique experiences, perspectives and understandings, and the meaning that they make of them. The question then becomes how do you lift that up and spread it?

Advice

- A funder wanting to stimulate learning loops is fraught with issues that stem from power dynamics. Funders first need to do their own work:
 - Why do they want to do learning loops? For who's benefit is that really?
 - Are they modeling and practicing what they are promoting in trying to stimulate learning?
 - Are they aware of the power dynamics implicit in their request and who is shaping the request?

These questions need to be addressed before getting to procedural/technical steps. It requires a lot of trust building. Participants must identify why it is in their interest to participate. If they don't, it is just another funder imposition. The constant academic, funder or NGO going into a community and extracting knowledge is very prevalent so people need to understand why it is in their interest to learn together, they have to be assured that they will own that learning.

- Be clear about what you want to harvest. Using a farming or gardening metaphor, you start with the kind of harvest you want to have. When this is clear, you then will understand what kind of soil, what kind of seeds, and how to best support and nurture the seeds through the growing seasons.

Examples from Key Informants

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The role of learning loops in networks: When a network comes together it is often with a presenting purpose and understanding about what it is they are setting out to do. Through a gradual process around learning and deepening trust comes deep conversation and then deepened learning. You get to a much deeper understanding of the system you are there to change. A phrase from a William Stafford poem - "If I don't know the kind of person you are and you don't know the kind of person I am ... we'll miss our star."

My experience is that people often step in at a superficial point of trying to change the system but are still operating within the rules. So it involves getting to the point of bringing the collective to an understanding of "the box" that we are in, stepping outside if it, and being willing to separate the subjective from the objective. You begin to understand that we are often projecting our thinking on to the world. So we have to get really curious about our own thinking and if we don't, we continue to project our thinking on the world and there are real limitations with that.

For example, Food Solutions New England has been a 4-year journey to change food systems but it is not simply about technical approaches such as more food hubs or changing distribution mechanisms. It is also about fundamentally understanding that the system is built on social agreements involving power and privilege-- who is in and who is out, what is valuable and what is not valued. It is socially constructed and grows out of these rules. We get up every morning using those rules because we are not aware of our own thinking and actions.

Systemic analysis begins with the question "What is our own contribution to the problem?" We have done systems mapping with Food Solutions that did not rely on computer-based tools that make the system seem like a machine. We wanted to bring human consciousness to the table and move away from a positivist approach.

Starting and sustaining learning loops: Learning loops should operate at various levels. In most of the networks I support there is a *core group*-- a process or design team that meets most frequently and is constantly paying attention to the process.

Then there is a *strategy group* that meets regularly but a little less frequently. This group is not just about doing—it is also about learning.

I don't embrace rigid structures. I believe we have over-mediated the learning experience. To me, learning involves dialogue. Learning loops literally begin with a story. I begin every gathering with deep story telling about our lives and who we are and what we bring to the table. The idea is as the poem goes, that "If I don't know the kind of person you are and you don't know the kind of person I am, then a pattern that others created will prevail in the world and following the wrong God home we'll miss our star." That understanding of one another is rooted in story and I would argue that understanding the world and systems is rooted in story. A lot of the work is about setting a standard around storytelling and sharing and listening and getting to know one another in holistic ways and really continuing that practice as we go. Every time we meet and get together, including on the phone, we make space for not just talking about business but checking in and checking out.

Another thing I bring to my work is a belief that amplifying the development going on is an underlying force in the success of these networks. I constantly ask people in the room to be reflective of their own development. What do they see happening individually and in the group? A concrete example is ending each gathering with the questions: "How are you now and how is this different than where you were at the beginning of this day? What do you have now or see now that you didn't see before today?" I use questions like this instead of asking "What did you like and what didn't you like?" because this question turns them into consumers and separates them from the experience.

Types of activities: In thinking about a broader network, Food Solutions New England involves six states that are part of a regional network. We continue to think about how to support broad-based learning across this network. Within the region there is an annual two-day food summit that brings together about 200 people. There is continuity among some of the participants from year-to-year and new additions at each summit. We have intentionally worked on increasing the cultural and racial diversity among participants.

There is a consciousness at the summit that wasn't there before we started 5 years ago. We highlight our history as we bring in new people to the conversation. At each summit, we build on what has come before. In plenary and breakout spaces, we are continuing to deepen conversation. Two years ago, we made a formal full group agreement that we are putting racial equity at the center of our efforts and "that train has left the station." We continue to fold in new people and not question whether this is right for you. It is right if you are here.

In terms of thinking about the wider reach of the network beyond the 200 people that might come every year, we are beginning to experiment with virtual ways to support learning. Last year we started something called the 21-day racial equity habit building challenge. We are offered it again this year. Over 1,000 people signed up for 21 straight days of prompts around race and racism and how it relates to the food systems and how it intersects with gender and class. We have created a virtual space for

people to voluntarily share depending on their comfort level. People are thinking out loud, creating a group consciousness that is starting to move toward double and triple loop learning. We learned last year that success is predicated less on who volunteers to wade in on the virtual spaces, and more on whether people continue to engage in powerful conversation after 21 days. This experience is spurring high schools and colleges around the region to do their own 21-day challenge. This year, other groups in other states did their own challenge simultaneous with ours.

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The role of learning loops in networks: We like to think that learning has to be formalized to be valuable. Learning, in fact, is a fairly natural event in human's lives. If you think about this organically, it is happening all the time. From my experience, the kind of activities or actions where learning loops tend to happen are in reflective conversations, meeting, and facilitations.

There is always some kind of learning loop going on in the mind of each individual within the context of the setting they are returning to. They may return with a different point of view or thought process and have conversations in their communities or their work context. They may change the way they view their practice.

I think interesting questions for Catalyst to answer are: where is it happening, how is it happening, and what is facilitating it?

Starting and sustaining learning loops: In the context of a group, learning loops can be started through inquiry--someone asking a "well-packed" question which has no easy answer to it. Good questions are those that require time and reflection to gain a deeper understanding of something.

A well-packed question tends to get into the minds of people in the network when someone in a supporting role says, "Oh wow, that is an interesting question." Then as human beings, our own predisposition to learn more takes over.

Good facilitators tend to create "containers" to initiate the learning process. These are spaces where participants can share their own experiences with each other. In human biology and nature one of the things that happened when we went from single cell reproduction to multi cell reproductions. Think of DNA which has allowed for a huge number of possibilities to emerge in terms of life and life's evolution. The kind of network events, Marnita's Table for example, is a version of moving from single cell replication and reproduction to multi-cell. Bringing people together in new and different ways allows for an exchange that would not normally be in your single cell reproduction framework. It creates a whole new set of possibilities for learning.

Sometimes our events can be like a really good massage--they feel good but they really don't hold. Sustaining the learning process involves more than connecting a series of events. People need to be able to anchor their experience to meaningful conceptual frameworks.

Types of activities/actions: I have a project in Nebraska that involves looking at how to leverage philanthropy to build small-unrestricted endowments in rural communities across the state. We have been using a peer learning process involving feedback loops to build networks. We are thinking about accelerating our learning by adding some intentional learning practices on top of the peer-learning sessions that we have been running for four years.

We have already gone through Round One which focused on 4 communities and we are in the middle of Round Two which will add another 4 communities. We are just launching Round Three that involves 5 communities. All this work is building toward a \$750,000 unrestricted endowment for these communities. Then we have another 12 communities coming behind that will get up to \$300,000 in an unrestricted endowment.

We have been tracking network connections within Round One, between Rounds One and Two, and networks and how they are connecting to each other and how they are contributing to an acceleration in the development arcs of these community funds.

I use the metaphor of a wagon wheel versus a spider web in describing networks. If you have a wagon wheel in which the hub is the Central Nebraska Community foundation, it holds all the community funds in rural NE with the communities being the spokes and the rim of the hub being the mission/purpose container. The relationships then tend to go from the rim and they don't go across the system. They don't go from one spoke to the next.

If you start seeing connections across the spokes it starts to look more like a spider web. In a spider web, the whole network becomes dynamic. If a fly gets caught in the spider web and tries to get out, it ripples through the whole web. This rippling accelerates feedback loops and the flow of information. It amplifies emotions and you have to lead the network in a different way than if you have a hub and spoke arrangement that tends to be more stable.

Watching these feedback loops/learning loops has been a 4-year project and it will probably go on for another 4 years. It has involved deep reflective practice with the other people that I am working with in that system.

Resources

Jewell-Larsen, S. & Sandown, D. (1999). *Personal development: The key to change acceleration in global operations*. Available at: http://www.ame.org/sites/default/files/target_articles/99Q4A2.pdf

Wenger-Trayner, B. (no date). *World Bank report and recommendations: Learning partnerships in the program for capacity building to strengthen good financial governance in Southern and Eastern Africa 2010-2014*. Available at: <http://sadcopac.pac-networks.org/file/view/14-11-21+WB+report+SADCOPAC+EAAPAC.pdf>

Wenger-Trayner, E., Fenton-O’Creevy, M., Hutchinson, S., Kubiak, C. & Wenger-Trayer, B. (Ed.) (2015). *Learning in landscapes of practice: Boundaries, identity, and knowledgeability in practice-based learning*. New York, NY: Routledge.