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## Creating a Learning Space

Creating a space for learning is critical for Civil Society Organizations that join together in order to address complex problems in innovative ways. Within the “learning space” CSO partners engage in inquiry aimed at generating knowledge from project experience. The learning space needs to be differentiated from the “operational space” in which the everyday work project is done. This section looks at the conditions and the facilitation that foster productive learning spaces.




## What happened in the Incubator project?



From the beginning, the Incubator project convened a “Civil Society Organizational Learning Forum” (CSOLF) as a formal learning space for the project. The forum was composed of the CEO and one other member of each of the four partner CSOs as well as the Program Manager and three members of the project’s research team. It met approximately once every two months and held an intensive two-day seminar once a year (three times over the three years of the project). Because the Anne Frank Center is located in Europe, its members only attended the yearly seminars of the CSOLF. The research team set the CSOLF agenda in consultation with the members and took responsibility for facilitation.

In practice, the CSOLF filled two functions. The first, it served as a space for reflection on on-going project activities, to identify emerging new knowledge and address challenges, through cycles of Action Research. Second, it provided opportunities for the partners to help each other learn through reflection on their individual and organizational practices.

The first function was most evident during the first year of the project, when the CSOLF focused primarily on the Training of Trainers, which was facilitated by the CEOs of three local partner CSOs. It provided a forum for reflection in which the CEOs shared their experiences and dilemmas. Beyond this, data collected by the project’s evaluators, including interviews, observations and journal kept by facilitators, were analyzed and presented to the forum. The data was discussed and the analysis validated and reconfigured. The other members of the CSOLF helped the members active in the project think critically about their ways of working, draw lessons from experience, and think about how put these insights back into practice.

The second function was carried out throughout the three years of the project. Each member of the CSOLF presented a personal case from her or his own practice. The case writers were free to choose the situations that constituted the basis for the cases. As a result, the cases were very different and dealt with different aspects of the participants’ experience as CSO managers. Although the participants came from different organizations that deal with different issues, all of them were able to identify with each other’s experience as examples of the difficulties encountered when trying to apply and disseminate ways of thinking and acting that challenge the social-cultural norm. The research team documented, analyzed, and sometimes wrote about these discussions so as to conceptualize and formulate the learning. It then presented these findings in subsequent meetings of the CSOLF in order to complete the cycles of learning. 

## What is a learning space?

A learning space is a structure dedicated entirely for reflection on practice for the purpose of generating *shared* knowledge through joint inquiry into important issues of common concern. It is primarily a “social” space rather than a physical one, differentiated from the “operative” space in which the actual project work is carried out. The learning space provides a framework in which project actors can temporarily step out of, and back from, the operative space of a project in order to critically reflect and learn together. Because of the pressure to get things done, spaces for learning rarely form naturally. Therefore, it is important to create and maintain formal structures for learning – e.g. a group – in the project and maintain it throughout the life of the project. For example, in the Incubator project the “Training of Trainers” was the main operative space for the first year of the project, but the CSOLF was the space in which the CEO’s could share their experience, test out their perspectives, get feedback, develop new ways of acting, and conceptualize their collective learning.

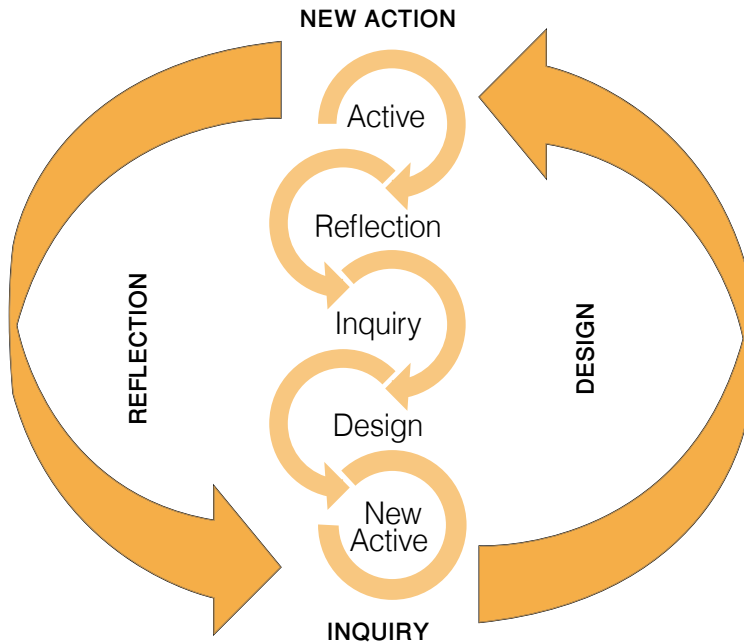
## Why are learning spaces important for partnerships?

Learning is essential when partnerships attempt to develop innovative approaches to problems. True innovation means entering into uncharted territory, developing new ideas of how things should be done, and testing these ideas out in practice. Furthermore, partnerships bring the knowledge of each organization to bear on new, shared goals and set of tasks. However, different organizations have very different ways of doing things, especially when they come from different worlds of practice. Having to act together automatically places the organizations into a new situation that needs to be addressed. Under these conditions, a dedicated learning space creates conditions under which new knowledge can emerge through conscious and systematic investigation into experience.

## Cycles of Action Research

Essentially the participants of a learning space are “researchers” of their own practice. The goal of this research, however, is generating *both* new action and new knowledge. This “Action Research” is a participative process that involves four stages: action, reflection, inquiry, and design—which leads back to new action. See the following draw.

**Action:** “Action” takes place in the operative space and is brought into the learning space by participants through reflection. *Reflection* makes



**Action Research as a sequential stages”  
“within endless spiral process**

action “visible” to participants in the learning space. It involves sharing practice situations, the actions that were taken (or not taken) to deal with them, and the outcomes of those actions. Reflection may focus on successes or on problematic situations and it can be done through storytelling or presenting written cases.

**Inquiry:** “Inquiry” focuses on generating new understandings that lead to the design of effective action in those practice situations. Productive inquiry begins with **not** understanding those situations and requires a genuine sense of curiosity. One of the barriers to inquiry is quickly imposing one’s own perspective or rushing to a solution before a problem situation has been looked at carefully. Inquiry looks carefully at how people perceive situations and delves deeply into the thoughts and feelings that lead them to do what they do. It considers the implications of these actions and alternative ways of perceiving, feeling, and acting. Productive inquiry involves open-ended questions, testing understanding of others’ meanings, probing how they arrive at their views, soliciting the views of others, and encouraging others to challenge one’s own views. Design is the process of translating insights and new understandings back into action.

**Spheres of inquiry.** Inquiry in the learning space can focus on a number of different spheres: the project itself, the organizations that are partners to the project, the relationships among these organizations, their relationships with wider environment, and the professional/personal skills of individual participants in the learning space. At the project sphere, joint inquiry provides partners with a framework for identifying important successes along the way and transforming the implicit knowledge into explicit knowledge that can be shared and reproduced. At the same time it provides a framework for identifying problems and barriers to success and for designing action strategies to help overcome obstacles in the way of project goal achievement. At the organizational sphere, the learning focuses on the link between the project and the kinds of challenges partner organizations face in everyday practice. In this way, the learning space becomes a conduit in which these issues find their way into project practice and learning from project practice finds its way into organizational life.

When tensions, conflicts or problems arise among partners, the learning space provides a framework for understanding the nature of these conflicts, designing productive ways of engaging them, and working to build healthier relationships. This sphere generates knowledge about managing tension between cooperation and competition, the meaning of partnership, and how healthy partnerships can be built and maintained. Another focus for inquiry into the learning space is the relationship between the partner organizations and the complex environments they must navigate in order to survive. Through this process, partner organizations may discover how partnership can help them work more productively with funders, government agencies, clients, and other key actors in the environment. This sphere provides the partners with a means of thinking about how they can shape the environment to make it more supportive and responsive to their work. The inquiry process in all of the above spheres begins with the lived experience of individual participants and ends with the new thinking, feeling, and action that they put into practice. The kinds of challenges faced at different spheres (project, organizational, inter-organizational, organization-environment) are always linked to decisions that individuals, or groups of individuals, must make and/or actions they must take.

**Reflective journals:** Individual reflective journals provide very rich data on which to base the Action Research process. Journal entries are written by participants in the learning space as close as possible in time to actions taken in the project's operative space. They contain people's account of what happened, their thoughts and feelings and

their interpretations of events while all of this information is still fresh in their minds. Reflective journals are important for two reasons. First, they provide individuals with a personal learning space. The very action of writing such a journal enables people to step outside of themselves and to look at themselves from a more critical perspective. Second, reflection journals extend learning beyond formal meetings to capture significant moments in project action. For example, the Incubator project, one of the CEO facilitators wrote a reflection journal after each of the ToT sessions. This material was extremely important in helping the CSOLF reconstruct what the facilitators were thinking and feeling weeks, and even months, after the events took place. It also helped lead to a breakthrough by providing insight ways of framing problems and acting that were problematic.

### **Conditions for a productive learning space**

A group, like the CSOLF, or some other formal structure is a necessary, but insufficient, condition for creating a learning space. The quality of the learning space of the CSO's depends on the degree of mutual trust, openness, and pleasure the participants generate through their interactions. On the basis of project experience and theoretical considerations, we suggest that there are number of conditions that contribute to the creation of a productive learning space. These conditions should be understood as "hypotheses" or "propositions" rather than as strict rules to be followed. They need to be tested for validity in each new context and new conditions can be added on the basis of on-going experience.

- **The learning space is differentiated from the operative space.**

Obviously learning takes place in every component of a project. The heart of a project, however, is the operative space formed through the interactions among partners as they plan, makes decisions, and put those decisions into action in order to achieve the project goals. The learning space, on the other hand, needs to be dedicated to mutual learning only. It is not a forum for decision making or managing the project. The learning space needs to be structurally differentiated from project activities and management. It should involve a dedicated group of project participants and others (see below) who meet regularly, away from the operative context, for the purpose of learning. The learning space may focus on specific decisions, problems, or dilemmas that arise in the operative space, but for the purpose of delving deeply into these issues, for questioning assumptions, and for generating new ways of thinking, feeling, and acting. These new ways of knowing are then fed back into the operative space, where decisions are made about how to apply new ways of thinking, feeling, and acting.

- **Participants from all partner organizations, from inside and outside the project.** The learning space should include the project management, members of each partner organization, and facilitators/action researchers. To the extent that participants from the partner organizations hold senior/leadership positions, the learning space will have a greater impact on the partnership and on the learning of the constituent organizations. There should be participants who are directly involved in the project itself as well as members who are **not** directly involved. The participation of the latter is particularly important for providing a wider range of perspectives, preventing the learning space from being simply another meeting of project staff, and for keeping the focus on all the spheres of inquiry. Finally, there should be a core group of participants in order to ensure continuity, but people may join on an ad hoc basis.
- **Everyone is a learner.** Within the learning space, all of the participants are equal, regardless of formal role in the project or partner organizations, as inquirers into experience and contributors to the emergent knowledge. All participants are expected to present “cases” for learning from their own experience and to open themselves to critical reflection and inquiry. Expertise is welcomed, but no one brings to the group privileged knowledge. Rather each individual participant’s knowledge needs to be subjected to validation through critical inquiry and testing.
- **Personal case-based learning.** In addition to inquiry into issues that arise in the course of joint project, the learning may be generated from the discussion of “personal cases” which participants present from their personal experience in any one of the spheres of inquiry. Cases are stories that illustrate situations that participants believe contain important knowledge. They are “data” which captures specific realities in the life of a project or the partner organizations. These data are then analyzed through a process of inquiry and become the basis for emergent knowledge. A case may illustrate a participant’s attempt to deal with a difficult problem, dilemma, or conflict within one of the spheres of inquiry. On the other hand, it may illustrate a situation in which a participant successfully dealt with a significant problem or issue. In either situation, the case should be approached as containing uncertainty or unresolved questions that can be engaged through the inquiry process. Cases should include a description of the problem situation, the context, and the thoughts, feelings, and actions of the case presenter – including attempts to reconstruct words that were said. Even though a case may not be a precise reconstruction of what happened, it provides an accurate



reflection of the case writer's experience. Cases should be written down whenever possible. The very act of writing a case provides the case-writer with an opportunity for reflection and learning. In addition, the written case makes it easier for all the participants in the inquiry process to step back and literally "see" the situation they are trying to understand. Furthermore, working from a written document provides an invaluable reference point for keeping the inquiry process focused.

- **Providing and receiving feedback.** An important part of the inquiry process is the ability to provide and receive feedback. The degree to which members of the group will be open to provide feedback, especially critical feedback, to each other is symmetrical to the degree to which people are willing to be self-critical and question themselves. Put in negative terms, people are unlikely to be open to feedback from people who are not open to acknowledging their own errors.

## Facilitation

It is generally helpful, if not essential, to have an "outside" facilitator(s) help create and hold the learning space until it takes on a life of its own. An outside facilitator is someone who is not a member of any of the partner organizations. Holding the space means creating a formal structure, while at the same time creating conditions that encourage participants to freely share their experience, to take a genuine interest in understand the experience of others, to provide and receive honest feedback. The facilitator is responsible for setting the agenda in a participative way. Prior to each meeting, all participants should be asked if they have a particular issue they would like to bring to the group. If so, the facilitator should help them frame the issue and create an appropriate case. If no one raises a specific issue, the facilitator should consult with the project management in order to come up with an agenda that can stimulate significant learning.

The facilitator should function as an action researcher who models and guides inquiry into the cases. The facilitator should enable and encourage all participants to become active co-researchers of their own practice. As a critical friend, the facilitator needs to be encouraging and supportive while at the same time providing honest and often candid feedback that may be uncomfortable or difficult to hear. The facilitator(s) should model this role so that all of the participants can be critical friends to each other in the service of learning. By the same token, the facilitator should model self-reflectiveness and openness to criticism. The facilitator's learning is no less a part of the learning space than that of the participants.