

CONNECTIONS

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The Work of the Kettering Foundation: Challenges and Changes Ahead

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On the Formation of Citizens

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Breaking the Mold: Journalism Reimagined

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INNOVATING FOR DEMOCRACY

The Kettering Foundation is a nonprofit, operating foundation rooted in the American tradition of cooperative research. Kettering's primary research question is, what does it take to make democracy work as it should? Kettering's research is distinctive because it is conducted from the perspective of citizens and focuses on what people can do collectively to address problems affecting their lives, their communities, and their nation. The foundation seeks to identify and address the challenges to making democracy work as it should through interrelated program areas that focus on citizens, communities, and institutions. The foundation collaborates with an extensive network of community groups, professional associations, researchers, scholars, and citizens around the world. Established in 1927 by inventor Charles F. Kettering, the foundation is a 501(c)(3) organization that does not make grants but engages in joint research with others. For more information about KF research and publications, see the Kettering Foundation's website at www.kettering.org.

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Learning Exchange: A Democratic Way of Working

By Sarah L. Murphy and Brad Rourke



Democracy offers the ways and means through which people can collectively control their own future. People decide what problems they face together and what to do about them. They may act in greater or lesser concert with one another. And they learn about what works in the face of their problems and opportunities.

Collective learning is key, as it generates a loop of insight and action that can lead to greater democratic capacity. In this way, Kettering's theory of democracy is learning-based. People learn their way into new ways of acting together. The essence of democracy is collective learning.

In its research, Kettering has developed a way of working with others that is intended to model, foster, and spread such democratic learning. To many, it may appear that these are just a lot of meetings. But they are more than that: they are learning exchanges. Each builds an intentional relationship among participants, where the key distinguishing feature is that it is a dialogue with a shared understanding that joint learning is the intended outcome.

For many years, Kettering's way of trying to learn and spread new insights about democracy through such relationships included meetings, held in person at our campus in Dayton, Ohio, where people could be



fully immersed in democratic learning. Part of that immersion included Kettering program staff and exchange participants who agreed to a set of research questions that helped to guide the series of meetings. This resulted in a shared commitment to learning.

All this was tested by the COVID-19 pandemic. In-person meetings, something that the foundation had relied upon for its research and democratic learning, came to a sudden halt. Virtual meetings on Zoom became the new normal for businesses and nonprofits alike. While Kettering was adapting to virtual and hybrid (a combination of online and in-person) learning exchange meetings along with the rest of the

country, it became clear that this was an opportunity to study and learn more about our own practices.

A hybrid meetings task force began as a small team charged with interrogating how to convene such meetings. We wanted to explore how to do meetings well in a virtual environment and initially focused on the technology required, the length, and frequency of hybrid meetings. Memos researched and written by Michele Archie, a Kettering associate, became the foundation for a conversation about the craft of designing and executing hybrid meetings. Program officers and associates joined the task force in exploring how technology can further the aims of Kettering's research and



“ We wanted to know what works and does not, what we can do better, and how we can take the best of in-person and virtual meeting formats to create an experience for participants that furthers the research.

allow for democratic learning. Here are a few key takeaways from these conversations:

- Start with the end goal in mind: What learning do we want to achieve and how much time do we need? What will the work be? How will we communicate with each other? By starting here, both participants and convenors can engage in shared learning no matter how they are present in the meeting.
- Intentionally create something special, provide equal footing for all participants, and recognize that how people are invited matters.
- A hybrid exchange can go beyond the set meeting time (synchronous and asynchronous) and involve diverse ways of learning, various platforms of collaboration, and flexibility.
- No matter how a meeting is executed, a learning exchange is about a relationship. This requires quality interactive conversations where we learn together and an immersive environment that promotes participation by everyone.

It soon became clear that even with the best technical equipment in place, it does not matter if the meeting is not designed and executed well. Archie described that

conceptual shift this way: “How do we encourage meaningful interaction and collaboration between remote and on-site participants in a single, shared meeting?” We focused specifically on the craft of designing learning exchanges to facilitate meetings that move our research forward and provide opportunities for collective learning. We wanted to know what works and does not, what we can do better, and how we can take the best of in-person and virtual meeting formats to create an experience for participants that furthers the research.

Our first insight was that we did not know enough about how participants experienced exchanges or what they were expecting from an exchange. Was collective learning happening? Did the Kettering way of working indeed model, spread, and foster democratic learning? To find out, Archie interviewed a number of people involved in designing and executing six different learning exchanges conducted between 2016 and 2021. This included Kettering staff and participants from outside Kettering, both first-time participants as well as people who have been a part of the Kettering network for several years. Of the six exchanges, all had different purposes and designs. Two were conducted in person, three were virtual, and one started in person and transitioned

LEARNINGS FROM EXPERIMENTS WITH HYBRID MEETINGS

- Be clear about the purpose of the meeting
- Have ground rules for expectations and participation
- Intentionally design and consider designing with participants
- Plan shorter and more frequent virtual meetings
- Create a sense of belonging and a shared culture
- Provide flexibility for virtual attendees
- Have a moderator for both in-person and virtual participants who work together to engage both types of participants
- Plan asynchronous work for in-between meetings and as pre-work
- Use digital collaboration tools: Slack, Google Docs, MURAL, Zoom
- Quality audio is more important than quality video

to virtual when the pandemic hit in early 2020. All the exchanges were built around practical engagement or experimentation that participants undertook between meetings.

This work revealed two key ways in which working through learning exchange creates value for participants: (1) exchanges generate insights that shape personal and professional understandings of civic life and

influence their professional and civic practices, and (2) they create new ideas for professional practice, based on their own experimentation and on hearing from other participants. These two elements are key to the collective learning loop described above. In addition, both exchange participants and Kettering program officers value the relationships developed.

The value of relationships is directly related to what interviewees identified as the top contributing feature of exchange design: the cohort. Most people prized the experience of participating with a mix of people from other places. The support, discussion, and collaboration that

occurs in these exchanges all helped participants in shifting their mindset and seeing that they were not alone in the work. In some exchanges, these cohorts became their own separate learning communities (which is another way to say that collective learning was occurring).

Asked for suggestions in each interview, exchange participants shared that they prefer smaller cohorts with more specific agendas that allow for deeper discussions. While they understand what they each learned from their experience in the exchange, it was not always clear to them what was learned or generated collectively. Closing the loop can help the group reflect on its collective



SHELLEE FISHER PHOTOGRAPHY

learning. Both exchange participants and program officers thought that combining in-person exchanges with virtual meetings was the best way to design learning exchanges in the future. In-person meetings provide a greater opportunity to develop relationships and create a cohort, while virtual meetings could be more frequent and focused on progress reports and specific questions from individuals or teams.

Michele Archie's report became an opportunity for Kettering program staff and network members to discuss and reflect on the interviews with exchange participants. That conversation surfaced several keys for Kettering to keep in mind as it looks ahead to future work:

- Be clear that we use the word *exchange* in two ways: (1) a relationship that develops over time with learning at the center, or (2) one episode, a meeting.
- Make clear to participants that what they are doing and learning matters to Kettering's research.
- Recognize that this way of working has a learning curve.
- Appreciate that collective learning takes time and can cause a sense of uncertainty. While both can be a challenge when there is urgency to the problems, it is important to recognize that learning and relationship building takes time.



Since its founding in 1927, the work of Kettering has evolved and continues to do so. Through it all, the foundation maintains its commitment to experimentation and learning.

Since its founding in 1927, the work of Kettering has evolved and continues to do so. Through it all, the foundation maintains its commitment to experimentation and learning. The past two and a half years forced us to experiment and learn our way through new ways of designing and executing learning exchanges. Reflecting on the resulting successes and failures positions us to better understand how collective learning can be improved—regardless of format. ■

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