Structuring and supporting success in multi-community initiatives:
Liaisons at the heart of an innovative engaged strategy

August 31, 2010

Angela K. Frusciante, PhD
Knowledge Development Officer
William Caspar Graustein Memorial Fund

For comments, please contact Angela at:

afrusciante@wcgmf.org
203-230-3330

Introduction

Challenging economic times are readily met with calls for increased innovation often understood as inextricably tied to the value placed on continuous learning and change. For example, in the management literature, knowledge is credited as the source of competitive advantage (Peltonen & Lamsa, 2004). Various notions supporting efficiency and effectiveness have been born from adherence to such values. Through these conversations, core concepts about learning have emerged from organizational development and leadership research, concepts such as the learning organization (Knutson & Miranda, 2000; Kofman & Senge, 2001; Marsick, Bitterman, & Veen, 2000; Senge, 2006) and communities of practice (Lesser & Storck, 2001; McDermott, 2000; Wenger, 2008). Concepts of learning communities have alternatively emerged predominantly in the fields of education and community studies (Hugo, 2002; Humphries & Martin, 2000; Kilpatrick, Barrett, & Jones, 2003; Wenger, 2008). Each of these concepts carries its own implicit promise for helping various entities address the fast pace of change in contemporary society and the learning associated with a knowledge economy. Although researchers have focused these concepts mostly on corporate or public concerns, they also have import to nonprofit endeavors such as foundation supported community based social and policy change initiatives.

There are undoubtedly examples of foundation literature that make explicit the connections between initiative design and these concepts. However, in the research, more often it is the case that the above content areas seem to be relevant but either implicit or, at best, disconnected from discussion of foundation approaches. As such, a deep understanding of these learning concepts as they exist in practice remains one step removed from the formal knowledge of foundation investment in change initiatives. We are also missing an understanding of the

2

relation of learning concepts to ideas of system-building and network development that increasingly underlay foundation supported social and policy change initiatives. As just one example, a perusal of the 2009 Foundation Review journal dedicated to comprehensive community initiatives revealed that although learning is addressed within foundation initiatives, it is often considered the domain of the evaluation function or a result of capacity building. Although the articles described and analyzed key processes such as planning, collaboration, and decision-making, little emphasis was placed on the learning structures embedded within these processes nor the potential role that knowledge construction had in the success or limitations of these activities. One article did dedicate some space to talking about learning systems and how foundation community initiatives often require real time learning. However, this was the exception not the rule.

Given my interest in this area, it is not surprising that during my first few days as the knowledge development officer for the William Caspar Graustein Memorial Fund, I was immediately intrigued by a role that had been created to facilitate learning and change – the community liaison. I negotiated the opportunity to examine this role. In thinking about the liaison role and my own experiences and background in community development and education focused on how knowledge is constructed in change initiatives,[1] I realized I carry some deeply held assumptions about the value of learning, the need for developing deeper understandings of how learning and change occur, and of how these relate to the creation of effective social systems particularly those that impact our children.

The exploration of the community liaison work holds promise in providing an investigative arena for understanding key concepts of learning as social construction and as

---

[1] My earlier research focused on knowledge construction as it was reflected in the theory of change evaluation reporting of a ten year social and policy change initiative focused on comprehensive community development.

embedded within a unique foundation approach that encourages engagement as essential to that knowledge construction. Through this paper, I bring together literature about various configurations of learning such as the learning organization, learning communities and communities of practice. I also describe the first level analysis of my exploration. I utilized a constructivist interpretive methodology as the way to understand the meaning constructed by participants in the study and brought in my experiential understandings and past work within community and learning contexts to infuse the analysis with my own real world engagement in social and policy endeavors. In this paper, I discuss the dimensions of catalyzing change through learning that emerged in the analysis and move to the implications for this work to the broader field of foundation supported social and policy change initiatives. This work has implications for foundation practice and initiative design as well as understandings of learning and change and ideas of how knowledge construction concepts intersect with notions of network development and system building.

Background of the community liaisons

The community liaison role was created by designers of the Discovery initiative. Discovery is a statewide initiative started in Connecticut in December, 2001 involving the identification of and, creation of local community collaboratives who each have committed to addressing early childhood needs of residents in their locales. Discovery draws from a comprehensive community building approach, that for the funder, the Graustein Memorial Fund, took the form of supporting -- through grants, technical assistance, and capacity building -- the collaboration of local organizations, parents, residents, and city and school officials in working together to identify and address developmental issues facing young children. Beginning with 45

4

communities, invited from a pool of 49 communities identified by the State as in need of assistance in education, Discovery communities today total 53. The initial Discovery objectives included "partnering with communities, collaborations and organizations" in value based and principled ways to:

- Expand the supply of high quality early childhood education
- Increase the quality of existing early childhood education
- Build strong connections between early care and elementary education, and
- Improve students' social, emotional and academic performance [2]

Beyond the stated objectives, the Memorial Fund mantra has focused on its intent to support collaborative groups in developing the capacity to "analyze, reflect, organize and act" in the interest of community change that benefits children. The independent evaluators of Discovery have also made explicit the theory of change underlying the initiative design. This includes assumptions about how to partner and with whom to partner and beliefs about how, through a systems focus, a critical mass of communities and organizations could come together in partnership to develop the capacity to make changes in early childhood practices and sustain attention to early childhood policy.[3]

Memorial Fund experience indicates that over the years the collaboratives have taken on the task of shifting from a program focus to a systems approach to supporting children. Community grantees have increasingly taken part in advocacy work through policy endeavors and interaction with advocacy organizations across the state, some of whom are also supported through Memorial Fund grants to engage in improving early childhood development. In addition, the evaluation has begun to show promising signs particularly in relation to the capacity building

---

[2] See the William Caspar Graustein Discovery website at http://discovery.wcgmf.org/
[3] See William Caspar Graustein Discovery website at http://discovery.wcgmf.org/category_250.html

approach for developing both community and statewide organizational capacity to act as

"catalytic agents of change" (Stephens & Studdiford, 2009) [4]

Signs of the promise of the Discovery approach call forth an exploration of the

management of the initiative, particularly in relation to the community liaison role that served as

a primary capacity building support to the community collaborative grantees. The creation of the

liaison role was a response to the combination of the very basic challenge for staff trying to

manage a multiple community initiative and their intent to provide communities with

development support that would lead to success. The idea of this support was inherently value

based, grounded in both the desire to nurture continuous learning and to encourage communities

to make decisions about what was best for them. There was a strongly held belief, amongst

designers, that these two desires could not be realized through the traditional power and authority

structures that exist in funder/ grantee relations. In response, a team of consultants was hired

each to work with a set of communities. With this decision, the Memorial Fund embarked on

what was to become the possible creation of a new professional role. This is not to say that

grantmakers had never used the idea of a liaison before nor that the components of what would

become the liaison work – coaching, technical assistance brokering, information sharing -- were

new to foundations. However, my almost two year exploration of the role from my position

inside the Memorial Fund, along with and initial background research, indicated that the way in

which the Memorial Fund conceptualized, managed, and deployed the community liaisons in

service to community decision-making and development was indeed unique.[5] This seeming

---

[4] A set of evaluation reports of Discovery is available at http://discovery.wcgmf.org/category_250.html
[5] Background research involved online and literature database searches for studies of similar roles, discussion with a foundation leader familiar with management practices, conversations with other researchers familiar with foundation structures, and a request for information from the ARNOVA listserv.

uniqueness and the limited discussion of the liaison role in foundation materials and research, indicates an area of needed exploration.

Uniqueness often comes from the challenges of the context within which a role emerges. Whereas knowledge in community change initiatives is often relegated to the realm of evaluation, with additional learning processes differentiated and situated within capacity building, in Discovery, knowledge development was understood as integrally embedded within the entirety of the work. As such it was included in the descriptions of the liaison role along with and connected to their primary functions of capacity building and sharing information. The concentration on knowledge development was emphasized by a statement made to me by the foundation's executive director to introduce me to the Memorial Fund. "The Memorial Fund seeks to be a learning organization" I was told " a learning organization amidst learning communities." The liaisons, as the word suggests, served the expected function of linking the foundation (learning organization) to the community grantees (learning communities) as entities. In my exploration though, I pondered the etymological origins of the word liaison which shows a French derivation meaning "to bind together" and wondered what this binding would mean, not in terms of entities, but rather to the ideas of learning and binding together knowledge across these entities.

One approach to studying the Discovery liaisons would be as an intrinsic case into the initial notion of binding or connecting entities. This approach would involve looking at liaison functions, their skills, their tactics and asking how messages were communicated, how values were conveyed, how information was shared. Much of this work, an independent evaluator has provided for the Memorial Fund.[6] I instead approached this study as a more loosely bounded phenomenon of meaning construction. I do so because of my preferred way of greeting the world

---

[6] Series of evaluation reports can be found at http://discovery.wcgmf.org/category_250.html

and creating knowledge but also because I believe that there is something to be gleaned from the liaison practice understood as the embodiment of knowledge betwixt and between a learning organization and learning communities and as mediated by the liaison community of practice. In my discussion, I argue that this understanding, beyond the current practice of the Discovery liaisons, can be instrumental in moving us beyond thinking about the liaisons solely as a functional position and toward understanding the *concept* of liaison, as manifested through the practice of a group of community consultants, as also a skilled perspective. I come to the question how this concept might be dispersed throughout a learning network as an essential distributed characteristic of any social and policy change endeavor -- a characteristic that is key to social system building in contemporary society where changing and adaption are key to survival.

Literature and the Memorial Fund configurations as contexts for learning

The concept of the Memorial Fund as a learning organization amongst learning communities, coupled with the idea that the liaisons have become a community of practice that moves between the organization and communities, does something interesting for us from a research perspective. It calls into question the configurations of each context as a space for liaison contribution. The literature on these configurations operates mainly in separate spheres and the task of using the literature to frame this study, is one of describing the essence of each body of knowledge in relation to the structure within the Memorial Fund's intitiative.

Learning organizations are formed through a combination of authority structures, missions, and often functional membership along with a focus on continuous learning.

> Real learning gets to the heart of what it means to be human. Through learning we re-create ourselves. Through learning we become able to do something we never were able

> to do. Through learning we re-perceive the world and our relationship to it. Through learning we extend our capacity to create, to be part of the generative process of life. There is within each of us a deep hunger for this type of learning….This then, is the basic meaning of a "learning organization" – an organization that is continually expanding its capacity to create its future. For such an organization, it is not enough merely to survive . 'Survival learning" or what is more often termed "adaptive learning" is important – indeed it is necessary. But for a learning organization, 'adaptive learning" must be joined by "generative learning," learning that enhances our capacity to create (Senge, 2006, pp. 13-14).

Direct experience is the most powerful impetus for this learning in that we take action and see

consequences of that action, to which we then take another action (Senge, 2006).

> But what happens when we can no longer observe the consequences of our actions? What happens if the primary consequences of our actions are in the distant future or in a distant part of the larger system within which we operate? We each have a "learning horizon," a breadth of vision in time and space within which we assess our effectiveness. When our actions have consequences beyond our learning horizon, it becomes impossible to learn from direct experience. Herein lies the core learning dilemma that confronts organizations: we learn best form experience but we never directly experience the consequences of many of our most important decisions. The most critical decisions made in organizations have system wide consequences that stretch over years or decades (Senge, 2006, p. 23).

To try to more immediately see and respond to its work, the Memorial Fund leadership

encourages staff learning through a number of structured vehicles. Regular management

meetings, although serving an administrative function, are often used to share information,

challenges and lessons learned in relation the Discovery initiative. Additional quarterly

facilitated reflection sessions are conducted where space is preserved for staff to engage topics

through literature, research findings, or evaluative writings specific to the initiative without the

related strategy or decision making tasks of day-to-day work. One-on-one meetings between

program officers and the executive director are also used to process information in the context of

the organization and the work specific to each program officer. A strategic planning process, in

2009 conducted with the use of a results based accountability as the primary tool also provided

an opportunity for staff learning. This process included consultation with almost 300

stakeholders including Discovery participants, statewide advocates, legislative decision-makers, agency personnel, educational leaders, funders, teachers, and parents.

Liaisons have contributed to the organizational learning in a number of ways. They contributed information and insights through their one-on-one sessions with the community program officer and in their monthly meetings. Liaisons have also participated in knowledge development activities through interviews and information protocols. They have provided information on the community progress through reports and assessment tools. I as knowledge development officer have also been tasked with attending the liaison meetings not just as a research endeavor but with an explicit attention to identifying lessons learned as they discussed in these meeting between liaisons as peers.

The concept of **learning community**, although sometimes used to refer to groupings within the organization, in Discovery is about multi-community based organizational and participant collaborations that bring together local stakeholders in dialogue, planning, implementation, and advocacy in system-building work focused on early childhood care and education. The collaboratives operate across organizational realities each with their own mission, structures, and professionalized functional make-up.

> Learning communities are made up of people who share common purpose. They collaborate to draw on individual strengths, respect a variety of perspectives, and actively promote learning opportunities. The outcomes are the creation of a vibrant, synergistic environment, enhanced potential for all members, and the possibility that new knowledge will be created (Kilpatrick et al., 2003, p. 10).

More specifically there are three types of learning communities "autonomous learning groups" focused on common study, "community development groups" for addressing real life problems through collaboration and sharing of resources and "community-action groups." Community action groups go "beyond encouraging a more informed citizenry or modifying social

10

behavior….to identifying underlying problems affecting geographic locales or social groups and solving them by taking action informed by new understandings. In short these communities are less about restoring a lost harmony and more about social transformation" (Hugo, 2002, pp. 12-18). Although Discovery collaboratives shared characteristics with each, the intention most resembles the notion of community action.

In support of learning, Discovery, liaisons attend community meetings and interact, with members, often work in a coaching role with collaborative coordinators and chairs. They help communities assess their own capacity building needs. They attend capacity building events alongside communities and then serve as a follow up support when communities try to apply the training at home. Liaisons share information about Memorial Fund events and opportunities and processes for grant application and reporting. They also facilitate the use of specific tools in the communities particularly those tools based on community self-reflective learning.

Communities of practice are groupings focused on shared work. They may support organizational learning by building a core identity around a work aspect and thus enabling the development of shared learning through an emphasis on practice. However they are neither inherently organizationally bound nor are they necessarily focused on a specific task.

> COPs are unlike organizational structures such as teams. Community relationships are formed around practice rather than assigned by an organization. Authority relationships emerge through interaction around expertise rather than through organizational hierarchical structures of authority. Communities are responsible to their own members not to externally defined goals. Communities develop their own processes, rather than those determined by the organization (Lesser & Storck, 2001, p. 832).

Management of the liaisons has evolved over time, once handled by a program officer with the assistance of an outside consultant serving as a technical assistance broker, and more recently engaged solely by the community program officer. Although preliminary interaction with the liaisons focused on the supports necessary for them to encourage effective parent engagement

and community collaboration, the management of the liaisons evolved into an engaged approach that makes fuller use of their experiential knowledge in communities. The liaisons have come together monthly for meetings, organized by Memorial Fund staff. Under current management they have become active participants in agenda setting, facilitation, and note-taking for the meetings. The content of the meetings includes a combination of administrative tasks, information sharing, and, on occasion, peer assistance or reflection on the liaison and community work. As part of their development, liaisons have recently been involved in co-design and facilitation of specific capacity building sessions for community participants adding an additional curriculum design element to their tasks and discussion at meetings.

Through attending and now developing training for community grantees, liaisons have come to develop shared language and skills with the foundation staff and community participants. Another noteworthy and language sharing activity occurred through the inclusion of the liaisons in the development of a community self-assessment tool that proved to be an example of the full use of the liaisons. [7] In this activity, the community program officer developed a grounded assessment tool that grew from ideas of staff and liaisons about the community capacities needed to support community collaboration and change. The process involved liaisons coming to a shared and explicit language about the concepts of community change that they held in their working with communities. These management practices – engagement, shared leadership, language development -- have served to develop liaisons as not just individuals but also as a group.

Although the impetus for the foundation/liaison interactions is often administrative or specifically related to skills and dialogue necessary to directly support communities, observation

[7] An article about the development of this community assessment tool is the topic of an invited article for the Foundation Review scheduled for publication in 2010.

indicates that, because of the collaborative management style, the liaisons often, although only for specific periods of time, engage as a community of practice. The liaisons in their current structure do not conform to all of the characteristics attributed to a community of practice (COPs). COPs are not confined by reporting structure; they cut across boundaries of institutional structures and hierarchies; they are defined by knowledge rather than task as a team would be; they are based in "something" and are formed based on shared practice and collective learning and therefore are different than networks that are primarily based on relationships (Peltonen 254-5). However, the liaisons do form into a temporary community of practice in that their discussion serves many of the functions of a COP. COPs serve as "nodes of exchange for interpretation of information;" they "can retain knowledge in "living ways" responding to local circumstance;" they can "steward competencies" through discussion of ideas, collective problem solving and collaborative inquiry; and they "provide homes for identities" being organized around "what matters to their members;" important is that identity helps to determine what to pay attention to "in a sea of information" (Peltonen & Lamsa, 2004, p. 255). Most importantly, as currently managed, the liaisons adopt the essence of a COP.

> Communities of practice develop around things that matter to people. As a result, their practices reflect the members' own understanding of what is important. Obviously, outside constraints or directives can influence this understanding, but even then, members develop practices that are their own response to these external influences. Even when a community's actions conform to an external mandate, it is the community – not the mandate – that produces the practice (Peltonen & Lamsa, 2004, p. 253).

This is manifested in liaison meetings when peer assistance is the focus of the discussion, in the ways in which the liaisons rotate facilitation, agenda setting and note taking for meetings, and in the times that liaisons request the presence of guests at the meetings for the purpose of connecting to information about current topics related to their practice.

These configurations of learning – Memorial Fund as a learning organization informed by liaisons, community collaboratives as learning communities supported by liaisons, and liaisons as themselves a community of practice -- provide structural contexts through which the liaisons -- as the embodiment of knowledge through their practice -- contribute to the Discovery work. As such, these structures are also configurations through which the liaisons construct their work through identity formation and the ongoing creation of a functional professional role that is supported through participation in these learning configurations.

Social construction of work

Understanding professional experience involves attention to how participants come to actively "construct their jobs" with attention to the "work identities" they develop (Wrzesniewski & Dutton, 2001). Although "work and job design" are often attributed to the management responsibility, "job crafting," is traditionally located with the workers.

> Job crafters are individuals who actively compose both what their job is physically, by changing a job's task boundaries, what their job is cognitively, by changing the way they think about the relationships among job tasks, and what their job is relationally, by changing the interactions and relationships they have with others at work. Job crafting is a psychological, social and physical act, in which cues are read about physical boundaries of the work and are interpreted by motivated crafters. Job crafters act upon the tasks and relational boundaries of the job, changing their identity and the meaning of the work in the process. In doing so, job crafters create different jobs for themselves, within the context of defined jobs. Thus, job crafting is a creative and improvised process that captures how individuals locally adapt their jobs in ways that create and sustain a viable definition of the work they do and who they are at work (Wrzesniewski & Dutton, 2001, p. 180).

Because of the developmental nature of the role, and the engagement of highly skilled professional consultants, job crafting in the context of the liaisons is not surprising. The liaisons, as managed by the Memorial Fund community program officer were involved as active

participants, in providing input and discussion about the liaison work, serving to make the process of job crafting more transparent and collaborative.

The issues of identity however are still relevant in that the Memorial Fund set out to, together with consultants and communities, create a new professional identity to support learning in a social and policy change initiative. This identity formation is one that is not solely understood through job descriptions or even stories of professional activity. As a social construction, and as embodied in the liaisons themselves, it is the realm of interpretation, interpretation best understood through exploration of practice. Community of practice literature specifically draws attention to meaning as socially constructed and emphasizes identity (Cox, 2005).

> There is the aspect of modifying the cognitive, relationships 'doing' part of the job purely for affecting performance and results. There is also the component that relates to one's identity with the job, that is, the relationship of one's self with the job…Modifications in the work may be initiated so that the individual's perception of the work may be changed. Hence, the presumed identity of self may also be changed. (Lyons, 2008, p. 27).

The importance of identity in relation to learning lies in its determination of "how an individual directs his or her attention" that in turn influences learning. This suggests that "identity shapes the learning process" (Lesser & Storck, 2001, p. 832). "There are no clear boundaries between the development of knowledgeable skills and the development of identities; both co-arise as individuals' participate and become central to the community of practice" (Barab & Duffy, 1998, p. 6). An aspect of the concept of identity is that it is tied to social communities,

> I will use the concept of identity to focus on the person without assuming the individual self as a point of departure. Building an identity consists of negotiating the meaning of our experience of membership in social communities. The concept of identity serves as a pivot between the social and the individual, so that each can be talked about in terms of the other. It avoids the simplistic individual-social dichotomy without doing away with distinction. The resulting perspective is neither individualistic nor abstractly institutional or societal. It does justice to the lived experience of identity while recognizing its social character (Wenger, 2008, p. 145).

A person is continually defining and redefining self in relation to a perception of what is "out

there" which is also defined in relation to how one defines self, making "the establishment and

maintenance of identity a core preoccupation in sensemaking" (Weick, 1995, p. 20).

Sensemaking involves a process of "invention that precedes interpretation."

> [Sensemaking] is also valuable because it implies a higher level of engagement by the
> actor. Interpretation connotes an activity that is more detached and passive than the
> activity of sensemaking. Sensemaking matters. A failure of sensemaking is
> consequential as well as existential…. The stakes are seldom as high when interpretations
> fail. Interpretations can be added and dropped with less effect on one's self-perceptions
> which is not true of efforts to replace one sense of the world with another (Weick, 1995,
> p. 14).

For the liaisons, what is "out there" must be understood in terms of multiple social contexts in

which they are active, the context of each learning community they are engaged with, the context

of their community of practice with other liaisons, and their interaction with the foundation as a

learning organization. It is within these contexts that sense making as inextricably linked to self

perception or identity can be understood. The identity process itself is always one of negotiation

of meaning.

> By living in the world we do not just make meanings up independently of the world, but
> neither does the world simply impose meanings on us. The negotiation of meaning is a
> productive process, but negotiating meaning is not constructing it from scratch. Meaning
> is not pre-existing, but neither is it simply made up. Negotiated meaning is at once both
> historical and dynamic, contextual and unique (Weick, 1995, pp. 53-54).

Meaning is thus always an ongoing process, one where meaning changes circumstance for which

further negotiation of meaning is necessary. "Meaning exists neither in us, nor in the world, but

in the dynamic relation of living in the world (Wenger, 2008, p. 54).

> The process of engaging in practice always involves the whole person, both acting and
> knowing at once. In practice, so-called manual activity is not thoughtless, and mental
> activity is not disembodied. And neither is the concrete solidly self-evident, not the
> abstract transcendentally general; rather, both gain their meanings within the perspectives

of specific practices and can thus obtain a multiplicity of interpretations (Wenger, 2008, pp. 47-48).

This meaning making process can be illuminated through the examination of liaisons discussion of their practice which is made up in large part of tacit knowledge.

> Tacit knowledge is always recreated in the present moment. Part of the reason … attempts to codify knowledge fail is that most of us cannot articulate what we know. Our knowledge is largely invisible and often comes to mind only when we need it to answer a question or solve a problem. When professionals solve problems, they don't just cut and paste "best practice" from the past to the current situation. They think about the current situation, reflect on their experience, generate insights, and use those insights in the present to solve problems. They draw from their experience to think about a problem (McDermott, 2000, p. 2).

They do this through engaging in practice, not in isolation but as a social process (Wenger, 2008, p. 47).

> We intend the term 'practice' to refer to the coordinated activities of individuals and groups in doing their "real work" as it is informed by a particular organizational or group context. In this sense, we wish to distinguish practice from both behavior and action. Doing any sort of "behavior." While "action" we see as behavior imbued with meaning. By "practice" then, we refer to action informed by meaning drawn from a particular group context (Cook, 1999, p. 387).

Practice and identity are thus connected with practice requiring the formation of a community of members (Wenger, 2008, p. 149) – it is a social process. Practice itself is also a holistic process

It is through an inquiry into practice then that the social production of meaning of liaisons can be explored as their embodiment of the concepts and actions of the work they do within particular arrangements of developmental configurations. The liaisons themselves are aware of the constructive nature of the work. Toward the end of the final group interview of this study, liaisons agreed that there really is no one liaison role. As one liaison -- talking about the variety of professional backgrounds from which the liaisons come -- put it "each of us is going to hear or pick up on something a little differently and I get a little concerned when we start talking about THE liaison role because I think that each of us has embodied it differently."

An emphasis on social construction as it is related to professional practice leads to questions of how the liaisons as a group, although each unique in their positioning and perspective, engage in common practice through shared making meaning of that practice. For the liaisons, this practice is situated in the realm of a group of colleagues that often resembles a community of practice and between a learning organization and multiple learning communities. Studying meaning making as a phenomenon is also a constructivist, interpretive task, one best addressed through qualitative inquiry. This paper represents the first level analysis, a content analysis conducted for thematic identification. The interpretive methodology is based in a constructivist framing with specifics of the researcher position drawing upon participant observation and at multiple points of active engagement with the liaisons.

Methodology

Together we construct our social reality. "We invent concepts, models, and schemes to make sense of experience and we continually test and modify these constructions in the light of new experience" (Schwandt, 2000, p. 197). Understanding these meaning-making processes relies on hearing the stories that individuals and groups tell about their experiences. This study is an interpretive qualitative study with a constructivist orientation in that it is accepting of the idea that humans are all active in their meaning making processes. Qualitative research as interpretive acknowledges that any process of social inquiry involves understanding -- an understanding that occurs through language and is inherently situated and mediated in a socio-historical and cultural context. This study focused on meaning as grounded in liaison stories of their experiences. The constructivist orientation takes its position both in the framing of the question as an interest in the social construction of liaison work and also in the awareness of the social construction that takes place between researcher and participants throughout the data

collection and analytic process. The essential components of the design included my positioning as a researcher and therefore my stance in data collection, my analytic perspective, and my approach to establishing the trustworthiness of the study.

Researcher positioning and data collection

Data collection for the study spanned nearly two years and included, and grew out of, my various roles in relation to the liaison work. Rapport building, the process of developing effective relations usually through gaining trust and confidence with participants in a study, was continually negotiated throughout the study (Glesne, 2006, p. 110). It took place alongside data collection as that data collection involved increasing levels of participant engagement on my part. The length of time I spent working with the liaisons was also supportive of rapport building. Although time is not the determining factor of effective research relations, "if you are around long enough, you can verify that the self you have been projecting is an enduring self" (Glesne, 2006, p. 114). Rapport was undoubtedly also supported through the history of the Memorial Fund interaction with the liaisons, a relationship whereby trust, mutual respect and shared concern for community work, all supported a sense of transparency and commitment to sharing knowledge. I expect that given my affiliation with the Memorial Fund, liaisons anticipated that I would enter the research with similar values as the other foundation staff. At the same time, because of my position in the foundation, I made no claims to being neutral or independent from the foundation. I did however commit to not sharing transcripts with other staff and to not identifying quotes by name of liaison without prior permission.

Primary methods of data collection in qualitative research include participation, observation, in-depth interviewing and review of documents. I engaged in each of these for data

collection purposes, as I occupied various roles in relation to the liaison work. The various roles

included being a **staff participant**. I was a participant in multiple ways. I attended monthly

liaison meetings taking general notes related to issues being raised or patterns of interaction that

caught my attention. I also collected documents that were produced as a result of these working

meetings. Inside and outside the meetings, as a member of the Memorial Fund staff, I engaged

in conversations with liaisons. Sometimes I played a specific role as knowledge development

officer in working with the liaisons on a knowledge development task or soliciting their help in

knowledge development activities. I also was a full participant with foundation staff in internal

organizational discussions about the work of the liaisons. This latter participation was heightened

over the last nine months as a result of the foundation's engagement in a strategic planning

process that brought to the fore conversations about the liaison work. Because of my interest in

this study, I utilized each of these roles as opportunities for participant observation.

In another role, I served as **manager of the evaluation process**. As knowledge

development officer, I was responsible for managing the evaluation work conducted by an

independent evaluator. Some of the evaluator work focused on the liaison role as part of the

foundation's capacity building efforts. Through this position, I was involved in processing

reports that emerged from the evaluator analysis of data acquired through liaison conversations,

and surveys, and interviews with staff and the communities utilizing liaisons.

I was also an **interviewer.** I conducted two interviews with each of the six liaisons.

Although, at this stage, I would not classify this study overall as a phenomenology, my approach

to interviewing was indeed phenomenological. Interviews were focused on

> lived experiences and the ways we understand those experiences to develop a world view.
> It rests on an assumption that there is a structure and essence to shared experiences that
> can be narrated. The purpose of this type of interviewing is to describe the meaning of a

concept or phenomenon that several individuals share (Marshall & Rossman, 1999, p. 112).

What was important to me from an interpretive perspective was "how people understand their worlds and how they create and share meaning about their lives" (Rubin & Rubin, 1995, p. 34). In the case of the liaisons I was concerned mostly with that part of their lives that encompassed their experiences and understandings of their work as situated within the Discovery initiative. Within this approach, to say that the interviews were semi-structured would probably, although accurate given the range of interviews that can fall within this classification, also be to give too rigid of an impression. The interviews were formal, often in my office or a small conference room, with a tape recorder, and with limited interpretive interjections on my part. I did enter the interviews with some general questions that I tried to ask across all participants. However, where individual responses went within the conversation was not controlled as my probing was impromptu and thus crossed the boundary into an unstructured interview whereby "a priori categorization" is not "imposed" during the interview (Fontana & Frey, 2000, p. 653). Although I was interested in knowledge construction related to the liaison work, to structure my probes according to literature categories or my own previously developed classifications would have limited the respondents from revealing to me how they actually constructed the work – the language that they gave it. I therefore allowed myself to follow the response where I thought most interesting, while at the same time bracketing my assumptions or tendency to frame probes according to my classifications. Instead I brought all the data together and allowed categories to emerge in the analytic process. Bracketing thus allowed me to "treat the data in all its forms equally" (Janesick, 2000, p. 390). For me bracketing meant that I was able to suspend the tendency to, too quickly, solidify immediate classifications. Although this approach to interviewing led in differing paths based on individual responses and my differential probing, it

provided a breadth of leads as to where to focus the group interview during which I then was able to get multiple perspectives on particular concepts or a "full consideration of a topic from diverse points of view" a way of establishing the desired "depth" of qualitative interviewing (Rubin & Rubin, 1995, p. 76).

Analysis

The analysis reflected in this paper was based on engagement with the data through its collection, transcribing and review. It was grounded in an inductive approach to interpretation. Although I engaged with literature throughout the study process, I did so, not with intent to categorize the data into existing schema, nor to test hypotheses or contribute incrementally to theory building. Rather the engagement with literature was for continual questioning of the data. It served to support the dialectic nature of constructivist inquiry (Lincoln & Guba, 2000, p. 165). In this way it allowed me to move from the specifics of the data to the broader conceptualization of the context, a context linked to an even larger scholarly dialogue about issues of knowledge, organization, and social and policy change.

I conducted a basic content review and constructed themes from the various forms of data collected. Although themes are often said to "emerge" from the data, what is really happening is that "after much hard work and creative thought," an "awareness" happens in the "mind of the researcher that there are patterns of order that seem to cut across various aspects of the data." (Shank, 2002, p. 129). In addition, the act of memoing (Maxwell, 1996) throughout the process and reflecting on my own experience within the foundation context allowed me to interpret and continually build upon my understandings over the course of the study.

Interaction with the liaisons through data collection also became a crucial part of the analysis process. My own analysis was increased through preparation for interviews, particularly the group interview for which I presented initial issue areas I saw emerging in my review of individual interview data. I was also intentional in the sequencing of my data collection which then aligned with my own processing of information. The first interview situated the liaisons in their own backgrounds, general experiences of working as a liaison and memories of coming to learn how to be a liaison. The second interview placed the liaisons more solidly into their experiences of the community work itself, how they saw success and challenge. At this time, I also sought to elicit ideas about liaisons in relation to each other. With the group interview, my intent was to ask liaisons to relate their concepts of themselves as liaisons, and their specific experiences in the community work, with broader meaning given to the liaison role as they put that role into action. At this time questions centered on the meaning that they constructed through that work.

Sequencing the data in this way took me as well through a sequenced analytic process, first grounded in the topical details of the liaisons as individual professionals, then as professionals in interaction with the realities of community work and each other, and then with attention to the connections made between self identity and the context of work, and thus the meaning given to liaison action. This coincides with various elements of interpreting qualitative interview data -- recognizing concepts, hearing stories and hearing themes (Rubin & Rubin, 1995).

Trustworthiness of the study

For interpretive work, trustworthiness emerges from the data collection and analytic processes of the researcher. If the researcher has entered the research setting successfully, built rapport, heard the participants, and proceeded to engage in systematic and in depth analysis of the data, all while reflecting upon and when necessary bracketing her own tendency to categorize too soon or to impose classifications based on her own assumptions or the literature, and has documented the process and her interpretation as indeed her own, then the study can be considered trustworthy. Additionally, various general constructs for determining the quality of interpretive work have been posed often in the form of criteria. They include a long list of concepts from multiple researchers, such as: credibility, transferability, external validity, internal validity, dependability, confirmability, applicability, constituitiveness, contextualness, reliability, (Creswell, 1998; Marshall & Rossman, 1999; Maxwell, 1996; Potter, 1996). Each criteria is often associated with a related strategy for achievement. I addressed some of these criteria through systematically collecting data, tape recording and transcribing interviews, and member checking ideas with staff and participants. However, my approach to addressing interpretive research quality is perhaps nontraditional. I have been influenced by Potter's meta-analysis that situates the conversation of quality as one of standards. Rather than drawing upon general criteria, I find it useful to first begin with the most pressing threats to a study, to frame these in notions of specific standards, and then to draw upon discussions of criteria and strategies to decide upon my approach to ensuring quality. For this study, because of the researcher's position of engagement, the most noteworthy threat has to do with relational quality of the study and the researcher's multiple roles in relation to the participants and their work. In addition, because of the unique nature of the topic of the study, establishing that the study is important

beyond its own context is crucial to establishing value. These threats are addressed in the following standards:

Standard of bracketed engagement: Although bracketing is defined by various researchers with particular attention to understanding discourse, in relation to this standard, my definition related not to the data analysis but to my position in terms data collection. It is a process of capturing my own thinking -- not to set aside that thinking but to be conscious in that thinking and to, therefore engage it fully in my interpretation. It is a bounding of thought that allows for the thought to be more present and also for space to be created for alternative thinking. This process is consistent with an awareness of how I as a researcher am actively constructing meaning rather than identifying objectively the meaning of participants.

Because of the relational quality of the study, it was not enough for me alone to recognize this bracketing. Rather, to address this standard, it was crucial for me to engage in my work transparently. In my various relationships with the liaisons, I attempted to be open about my position, my purpose and my research intent. Given the length of time working with the liaisons and the various roles that I played, this became challenging and required a continual self-reflection on my part to make conscious my own intentions. The engagement with staff about the liaison work was even more difficult in that I tried to distinguish when my input into management questions was related to my own participation and when related to emerging interpretations from early data analysis. In both relationships, I expected of myself, not a detachment, but rather a conscious accounting and ownership about where my perspective was based.

Standard of reflecivity: Clearly overlapping with the bracketed engagement, was another expectation that I be self reflective in my interpretation of the study. This involved

understanding how my own background and framing was potentially influencing how I understood the liaisons' experiences and how my interests in the liaison work as a program officer may have influenced my framing and interpretation of the study. The process of analytic memoing helped in this way, but beyond even written documentation of ideas, my experience in embracing a self reflective stance made this type of thinking easily accessible.

Finally a **standard of relevance** was prominent for this study. I accepted that, given the uniqueness of the liaison role, there was a possibility that the work would end up being more intrinsic in nature with relevance only within the context of the liaison work. However, my intention and hope was that the study would be less an intrinsic case and more a study of a phenomenon that would have relevance for our understanding not just of the liaison work but of professional identification, knowledge construction within networks, and the place of engaged and embodied learning in system building work. This standard prompted me to question analytic results for their relevance beyond the immediate context.

This paper admittedly reflects only the first level of analysis in this work. As I collected data, I was processing that data and then I reviewed the complete set of data once interviews were all transcribed. I identified themes from this first level content analysis as key to furthering the discussion with the liaisons. These were then provided to the liaisons in preparation for a group interview, during which talked about some of the themes in depth. The identification of themes did not mirror the liaison responses to specific interview questions, but rather were revealed throughout their entire interviews. For example, I did not ask about systems thinking per se in interview questions and as I analyzed their responses. However systems concepts were raised as liaisons answered other questions. Consistent with a constructivist approach, the themes therefore do not reflect the truth in the data but rather are an analytic product of the researcher

interaction with the interview data It serves as a study in and of itself into the meaning that is constructed through the practice of the liaison work and will also serve as the first aspect of continued study that I expect to focus on the processes of construction.

The anticipated next layer of analysis will be an ethnomethodological approach that involves the systematic coding of data and relational analysis to better understand how, or the processes by which, meaning is constructed as situated within the liaison relationship to the Memorial Fund, to the community work and to their own professional training and associated cognitive maps of how community learning and change occur and can be supported in change initiatives. The following first level analysis forms the beginning.

Findings on the conceptual context and meaning-making of the liaisons

Conceptual context of the liaisons

The Discovery liaisons were conceptualized as part of the capacity building supports offered to community collaboratives receiving funding from the Memorial Fund. They were created shortly after the start of the initiative after the staff realized that their serving as support to 49 communities was neither feasible, given the number of communities, nor the most productive, given the realities of authority and power in funder/grantee relations. Leadership and staff believed that if the intent was to truly support the establishment and success of community collaboratives in making decisions that were right for their locales, then the funder support offered truly needed to be understood as non-directive with suggestions and advice given divorced from the funding decision-making. Six liaisons were thus hired each to work with

between four and ten communities. Their role was conceptualized as contributing to relationship

management, capacity building, knowledge development and public will building[8].

An independent evaluation of Discovery, including investigation of the role of the

liaisons in capacity building, has shown that liaisons did provide support to communities such as:

acting as an information link to the Memorial Fund; collecting and sharing lessons learned;

serving as a resource to and sometimes facilitator of collaborative group activities, providing

feedback on strategies, progress and challenges; and helping to identify capacity building needs

and technical assistance strategies (Stephens & Studdiford, 2009, pp. 20-21). Through

interviews and survey responses with community coordinators, evaluators found that the liaison

support was one of the most valued supports, according to communities, particularly in relation

to the perceptions of liaison value to community learning (Stephens & Studdiford, 2009, p. 23).

The evaluators note that "an on-going relationship with the community liaison has been an

important way for communities to understand the values and goals of Discovery and receive

feedback on their work" (Stephens & Studdiford, 2009, p. 24).

An additional in-depth evaluation study of the liaison role situates the liaison work

amongst foundation challenges in community change initiatives (Stephens, 2009 (Under Review)

Four challenges were outlined and the liaison role discussed in relation to how they were used to

address these challenges in the Discovery initiative. Liaisons were utilized to address the

challenge of managing a multi community initiative. Issues like time demands, building solid

relationships, and ensuring timely communication were all noted as basic management

challenges. In addition, handling issues related to power differences between funders and

grantees, supporting capacity building in communities, and responding consistently to

communities as they themselves engage in various trajectories of change, were other aspects of

---

[8] Taken from 2006 job description.

community change initiatives that the evaluators suggested were addressed by the liaison strategy.[9]

Interestingly, in addition to describing the functions served by the liaison role, and the characteristics and beliefs of the liaisons and communities about that role, in looking at the role over time, the evaluator documented a variety of perceived shifts in the *role* of the liaisons. The most blatant of these was the perceived shift from a critical friend position of reflecting back to the communities and asking probing questions to a facilitative role where liaisons actually led community process around use of specific tools. However, Memorial Fund management understood these to be shifts, not in role, but in activity and suggests that an examination, framed in the context of learning, would actually reveal that the perceived shifts were indicative of the liaisons' growing comfort in the originally perceived role and the trust of communities. This potential speaks to the nature of the development of a new role and the learning curve required for all involved to become engaged in the work at a sufficient comfort level to enact the liaison position as originally intended. It points to the length of time necessary for trust to be built so that a liaison can effectively support learning. The distinction also points to the possibility that a role that is as grounded in the realities of community work may also never be standardized across individuals as it comes to be embodied in the skills, beliefs, and approaches of the individuals themselves and their relationships to community members.

Within this context, liaisons exhibit the ways in which they collectively have come to understand their practice, in relation to, but not totally defined by their job descriptions. This understanding is a meaning that is constructed: within an organizational mandate but also in relation to the professional backgrounds and perspectives of the liaisons themselves; through the

---

[9] The report about the liaison role provides a useful documentation of the work as situated within broader concerns of foundations supporting community change initiatives and ends with lessons learned for the field.

liaisons as a social group, and through the interaction of the liaisons with their very specific and

tangible community work. Three aspects of this meaning making come through in the thematic

issues revealed in interviews with the liaisons: critical friend, systems thinking and encouraging

change.

Liaison meaning-making of their work

Critical friend

The concept of critical friend has been a key idea since the creation of the liaison role.

Most liaisons, when asked initially about the "work of the liaison" immediately used the term

critical friend. Although not all liaisons draw upon this term immediately, it is never far from the

surface of conversations, and debate -- sometimes leading to commiseration -- is easily initiated

around this aspect of the work. As one liaison noted:

> The first year was the most uncomfortable because it felt restrictive. The role of the
> liaison was very, what I call restrictive. Only go, sit quietly and these are my words. It's
> not like anybody told me this is what you have to do." But my interpretation of the role of
> liaison initially was very little engagement in the process – really there to be that quiet
> support, that reflective mirror, and what I found was that it was frustrating for myself as
> well as the collaborative.

The liaisons hold differing perspectives about their charge to be a critical friend. The liaisons

also hold different perspectives on the term "critical friend" itself, sometimes calling it a

"friendly critic" or a "friend who critiques," and sometimes not wanting to use the term at all.

General distaste is shown for the connotation of being critical noting that critique can often cause

an individual or community to "shut down." In all the responses to this term, what emerges is a

relating of the concept to a responsibility to question rather than critique at all. Liaisons refer to

their work as asking tough questions and probing what is below the surface, as sometimes using

questions to "raise consciousness," and as helping communities reflect on their own dynamics

and how they are doing the work. One liaison referred to it as "naming" the problem. "So I am not walking in and saying you know this is a real problem and you should change it or you should do this or that or the other, but it is just about naming it and sometimes I find that that is exactly what a community needs in terms of being able to proceed."

In addition, the liaison role was noted as multi faceted, with critical friend being only a piece of it, a piece that is engaged at appropriate times. The liaison role was also described as being about relationships and personalities and being impacted by various contextual factors such as the foundation decisions on grantmaking focus. The liaisons thus are conscious of the complexity in the role. However, what have been perceived by the liaisons as shifts in the role as supported by the Memorial Fund, may actually have been the liaisons own growing comfort with the tensions embedded in the role.

> Cause I came from being a consultant which is kind of a different role. But I remember from the beginning being cautious about being too involved, making suggestions, being too directive in what I was doing. I was worried about doing things that was directing the group too much or being too much of a consultant…. I was aware from the beginning that the role of the liaison is to be a little bit more of an observer and a little more passive with the community and certainly ask the right questions and that kind of thing…but I'd say that some of my learning is that I've relaxed a bit around that, that I am still very cautious – I am not going to jump in and tell them what to do or anything like that, but I've gotten more at ease about that sort of thinking about what communities need in the moment and sometimes it is a suggestion.

What liaisons don't talk about is the possibility that, once the role of critical friend is established, through time and trust, the communities may no longer perceive suggestions as directive and thus the liaisons may acquire more latitude in their interactions than is present during the initial days of trust building. Liaisons themselves over time may have also come to different understandings of the idea of what a critical friend is and does.

31

At the time of the group interview, when prompted, liaisons openly struggled with terms, some that they had used themselves in individual interviews, like objective, neutral, unbiased and nonjudgmental, as these might relate to their role. By then, most disagreed with the liaison work being classified in these ways, and then revealed the nuances of their thinking about these terms.

> I don't feel like I can ever be completely unbiased because I have sort of, I hold the Discovery values and principles to match my bias and that's what should be my bias as a liaison.

> I am not sure human beings are ever completely objective…or neutral completely. You are part of larger world and culture and so on.

> I guess I agree with the statement .. [that bias is part of the role]. I'm not sure I agree about the word objective or not using the word objective. I think I might substitute it with open or non judgmental because I feel that part of my role … is listening for the under represented voices.. I am not so sure that we can't be, perhaps not purely objective, but … I am not trying to make judgments in terms of good or bad, right or wrong…

> I am wrestling with the nonjudgmental

> Being in any way directive, to me that's judgment, you are judging and asking these pointed questions to get them to think about …

Despite differing views on the role, the perceived integral nature of the critical friend concept to early messages of the liaison role and its continued presence in conversation is something that the liaisons share. This points to its value as an artifact of the position. It has become an object that the liaisons walk around, interact with, and use to bounce off their thoughts about their work. They commiserate through laughter and sighs of comradery, about the challenges of this charge and how to be useful in community work by asking questions, but not being too directive, and by sharing their experience and insight but not forcing their perspective. When asked about community episodes and opportunities for supporting change, the liaisons talk about the specific times when questioning can help to move a community in a new direction. They speak of times of internal transition (a coordinator or chair leaving), tension (a mayor being

32

arrested), or opportunity (a new superintendent search being initiated) – each offering a time when a question or series of related questions was enough to open communities to a moment of reflection, a new perspective, or a targeted strategy.

Through the discussion of the term critical friend and in times that liaisons talk about the essential questioning responsibility linked to this term, the liaisons also pull at the nuance of their own thoughts about supporting community change. They talk about "therapy," "timing," and "defensiveness," and needing to know where communities are in their development and when they can handle the critique and when they just need support.

> [I]t raised for me something we talked about earlier – that continuum of critical friend to more active hands on you know consultant and you have to know where they are in their development, how open they might be to a critical friend or friendly critic feedback and when they just need you to help them turn in a different direction.

In this way, in interaction around this term, liaisons elucidate ideas about the nature of community collaboration and ideas about success in community change being linked to a group's ability to come to manage its own internal challenge in pursuit of a mission.

> Ultimately it looks like people in the collaborative asking questions of themselves and each other so at the beginning those might be things that I would be doing and asking questions…. but when a group kind of gets that, then they are doing it and they're doing it very actively. And I think well my job is done because then they are really working at many levels and all dimensions and there is what we call… safe space for people to really get in and intervene and not feel self conscious about it – just a high trust level that they can take chances, say things, and even potentially be somewhat confrontational among themselves.

Embedded with these notions of community change, the term critical friend has therefore perhaps also become an artifact of liaison pedagogy, encompassing ideas about community learning, how the ideas of relationship building and trust factor into learning, and what the signs of success are. The liaisons share stories of the moments when collaborative members ask the questions themselves and initiate the reflective process, sometimes even conjuring up the name

of the liaison, even as they no longer require that outsider. In responding to a question about a

success as a liaison one liaison noted:

> It happen[ed] now a number of times. When I first began, it was always… "I'm going to
> be the mirror in the room. I am going to reflect things back. I'm going to try to get you to
> think about things that you haven't before. Ask those questions that maybe, as an
> outsider, it's easier for me to ask." I hear people asking those questions now… That's
> been gratifying, that people are thinking differently than they normally do, thinking there
> might be other perspectives, and getting themselves to realize that although we think in
> this room of twelve people, this is working, what might be missing. So that's been very
> gratifying to see that, that they've taken that ownership on and in some ways, it kind of
> works us out of a job. You know, at some point, you reach the point where they are able
> to ask these questions on their own which I think is very good.

Seeing beyond the people at the table, is directly connected to liaison's use of the term critical

friend to mean helping to keep communities focused on the "big picture." Sometimes this was

used to refer to the overall mission of the community collaborative and at other times it was used

to refer to the broader mission and goals of Discovery. It also sometimes was related to the

notion of systems.

Systems thinking

Another aspect of Discovery has been an intentional encouragement for community

collaboratives to move from thinking about programs to thinking about change in broader

systems. Capacity building supports have been offered to communities to help this form of

thinking through emphasis on collaborative planning processes that bring people from various

organizations together in discussion of sustainable results beyond just individual service outputs.

Liaisons readily refer to ideas of systems, sometimes in very abstract conceptual terms and

sometimes in reference to specific community configurations like the "school system."

> One of the things that comes to mind is systems thinking is a framework that I am always
> kind of holding, of understanding the parts of a system, how they interrelate, how you
> make some change in one area and it impacts another. And that's so critical to

community work because it's all an interrelated whole really. So I think I am always kind of coming from that perspective and that's part of [what] I was mentioning -- part of what I do is help them hold the bigger picture.

Underlying the liaison comments are assumptions that systems change is more sustainable than programmatic activity, has a broader community wide impact, and has impact beyond initial investment of funds.

You know you have a program for like fifteen parents, by the end of it, those fifteen parents might have been served really well but if this money is removed … what's the difference about your community in terms of how you deal with children?

Embedded in the systems concept is then also a notion of strategic thinking, how activities at a local level can be used and have value beyond the specific activity. Furthermore, there is a notion that the resources of the Memorial Fund are best invested in systems change, in that limited resources can not support programming efforts but can influence the way things are done. Referring to Discovery funds, one liaisons noted, "its [the money is] not enough to "do," but it can certainly be used to ignite."

When discussing the barriers to systems thinking, liaisons suggest that there are different perceptions about the existence of an "early childhood system." Some people don't consider there to be a system at all. There are limitations to an individual's understanding of what systems are and how they function. There may be limitations in skills particularly where individuals have been responsible for programmatic activities and have not had experience in working across organizations. Even when systems are acknowledged, and understood, some individuals just do not believe that systems can be changed or that their small collaborative can influence change.

[There is a] difference between understanding and thinking that we can't change it. You know the shift in collaborative .. and I think in terms of systems and .. that notion of .. I always [remember] my mother saying "you can't fight city hall." And again the fabulous shift that starts happening when in fact you can. I think that sometimes it has been that, we can't go there, so let's focus on our little area of the work.

Sometimes a barrier has to do with how finances are controlled. Liaisons link the issue of

financing and particularly transparency, as key to effective implementation of community

decision-making, as symbol of "higher level thinking," and as critical to building strong

collaboration. Where there is transparency, there can be flexibility and shared decision making

and when there is flexibility, communities can utilize financial resources strategically and

opportunistically to build strong alliances that can move system change.

All liaisons seem to share in this systems focus and engage in conversation about how

systems thinking can be supported, taught, or engendered in a community collaborative. Their

own depth in understanding systems and some of the tensions embedded in the concept of

systems change came through for example when one liaison makes explicit that another barrier

to change may just be the "lack of a sense of urgency" that can be precipitated by individuals

within systems, people traditionally very skilled at giving the assurance and perception that no

change is necessary. How they use their critical friend role in asking questions that prompt

systems thinking is one aspect of the conversation as is the appropriate role for a liaison in

prompting that sense of urgency.

Liaisons add to this focus on systemic thinking that the location of the community

collaborative within a broader system also influences the on-the-ground community work and

this is different for each collaborative. Whether it is skill in knowing when to distance the

collaborative from the larger political dynamics for example with a specific mayor or whether it

is in figuring out the best way to interact with a collaborative agent within their broader

structure, collaboratives are not outside of systems looking in but are actually operating within

the systems they are trying to influence.

> There is also a level of confidence that they need to have because in many instances they
> are embedded in a larger system, let's say the board of education is the typical one. So

they're in, somewhere in the middle where they don't have the authority to say to the superintendent, "this is what we need to do." So its hard to come in with that skill set, to be able to do that.

The idea of systems thinking thus comes to be a locating of the work in relation to ideas of interconnection, in relation to ideas of established hierarchies and arrangements, and in relation to the concept of change. One way in which notions of change are revealed in the liaison discussions is related to the concept of permission giving.

Giving permission (or encouragement) for communities to change

Communities come to be formed around patterns of behavior and understandings of the world. For community groups who seek funding, they are also accustomed to ingrained practices of funding with their own assumptions about authority relations in connection to financial resources and perceptions of power. The Memorial Fund sought to alter practices partly through its own engagement with communities in the work. Additionally, as part of this, the liaison role was constructed as an intermediary that was somewhat distanced from the perceived authority of the Memorial Fund.

Nevertheless the liaisons as intermediaries served a communication role, sharing basic logistical information between the funder and the grantees. They also talked about how they served to "translate or communicate the values of the Memorial Fund" and to tell about the foundation's "perspective," and "translate" opportunities. One liaison said of communities, "They are really turning to me for interpretation, understanding, guidance to be on the right track."

Serving this role effectively required that the communities build up trust in their liaison role. One liaison relates this trust to communities recognizing that the liaison wasn't just a way

for the funder to "keep track of what was going on." Liaisons and evaluation reports note, that

the communities have come to know, through experience, that the liaisons are not monitoring or

trying to catch something wrong and that liaison comments and critical questions are not

associated with negative funder results, nor are the liaisons in positions to make decisions about

community funding. However there is a not so subtle nuance to the role as well. As one liaison

suggests:

> The lines have been drawn and people are really clear that we are not speaking on behalf
> of the Memorial Fund and that the community relationship is directed at the Memorial
> Fund and that's an open pathway, that the liaison is not standing between them in any
> way. At the same time… I see that when I speak up in a meeting everybody stops talking
> and listens to what I have to say…. But you know while we don't represent the Memorial
> Fund, we are representatives of the Memorial Fund…. If we say something.. I am very
> cognizant of the fact that they are not saying that [this is what she thinks], they are saying
> "the Memorial Fund has put this person into our midst" and therefore it imbues me with a
> certain degree of power and influence that I don't really have you know. And that's fine,
> I just think that that's something I have to respect and I have to be really thoughtful about
> what that can mean to communities. I won't say it's something that I wasn't aware of in
> the beginning, but its certainly something that I have grown more skillful… in
> understanding and diffusing it or using it as appropriate.

Therefore in serving this interpretive role the liaisons are not altogether removed from the

perception of funder authority. How the liaisons have used this position of power and perceived

authority is key to understanding how they practiced their role. One liaison used the term "giving

permission" and analysis of the liaison responses, although others did not use the term, indicate

that this concept could take on various aspects. The concept can also be understood in relation to

encouragement but given the underlying perception of authority, permission giving may be more

accurate.[10]

In talking about the tendency of the communities to ask a liaison what the Memorial

Fund would say about an issue, one liaison notes always being clear about not being an

---

[10] Note that the data from this study came all from the liaison interviews and thus their perceptions of community
interpretation. Whether community members actually related to the idea of permission giving must be gathered
through interviews with them.

employee of the Memorial Fund and encouraging direct contact with foundation management. "The Memorial Fund is going to support what the community feels is in its best interest … as long as it makes sense. The Memorial Fund does not have a prescribed method for expectation outside of the two non-negotiable issues of collaboration and parent engagement." This encouragement for community to do *what is in its own best interest* is just one way in which the liaisons "give permission" to the communities.

Another way is through the encouragement toward flexibility. Liaisons talk about the notion that communities have gotten used to traditional approaches to funding and need permission to *rethink their approach* in light of their experience and learning and to sometimes even "reduce their scope of work" in relation to foundation funding – being realistic to context rather than the tendency to promise too much.

> [In] traditional grant writing, you have to really strongly state your case about how bad off your community is, so there is a tremendous amount of focus on the negative aspect of your community. Then you are supposed to come up with an elaborate plan of action that is going to correct these horrible things in your community. So you have to be horrible to get the money and you have to have an extravagant plan that somehow indicates that you are going to fix all these horrible things – which we understand is not possible.

This liaison talks about conveying the Memorial Fund's desire for communities to be successful and telling communities that they can adjust their work, in communication with the foundation, even after the grant is awarded.

Permission or encouragement to *act based on Discovery values* is another aspect revealed in liaison discussion about work in the communities. In discussing a specific decision-making incident, one liaison talked about helping the collaborative to look at their own process, to think about who was missing from the table, and to be more effective. When asked what might have

happened without the liaison present, the liaison replied "they would not necessarily adopt or infuse their work with those values without sort of that kind of reminder."

Closely related to the values reliance, another way that liaisons may give permission is in *changing the "normal" ways of doing things*. As one liaison commented, "I think the liaison role is really getting people to understand and to operate from a different way of doing business which, at the base of it, helps to break out of those community patterns." The liaisons also serve a role in continuing the questioning into visioning – asking questions that will assist the collaboratives in consciously proceeding in new ways.

Although not talked about in this way, the encouragement provided by liaisons is embedded with a notion of community ownership. To embrace the power to decide what is best for a community, to adapt to flexibility, adopt a value based stance, and to change community patterns all link to a notion of ownership and ultimately to accountability. Over the years, liaison characterizations of the community work indicate that at least some communities have accepted ownership in the Discovery work asking less for that permission and interpretation. As one liaison told,

> One of the things that I really appreciate about the Memorial Fund is that there's a great deal of emphasis with the communities on making decisions that work for them. And also I find that there's a little bit [in the communities] of 'Can we really do this?" you know rather than "What does the Memorial Fund want." So the notion of catalyst which is certainly about providing resources and a broad range of resources and at the same time not being directly in the mix of community, to me has the quality of catalyst.

Another liaison notes, serving the role requires that she understand and believe in the integrity of the Memorial Fund's commitment to true partnership so that she can communicate this to the communities.

The liaisons participate in this work of being a critical friend, encouraging systems thinking, and interpreting from a unique vantage that allows them to be engaged in the both the

Memorial Fund and the communities and as such to navigate the perceived authority that they

possess. In other words, they operate as part of a community of practice and in support of their

own learning at the same time they interact with a learning organization, often providing much of

the raw insights to foundation for program staff learning. At the same time, the liaisons work

with multiple learning communities serving as an interpreter of information and values,

sometimes within communities, often between communities, and frequently between

communities and the funding organization. The above analysis of practice has sought to capture

liaison thought and action through meaning making in relation to knowledge development

function of the liaison work. The process has led to the analytic emergence of dimensions

related to catalyzing change in learning initiatives.

Discussion of dimensions of knowledge development

Knowledge development as an embodied endeavor requiring engaged practice

Tacit knowledge is embedded within our thoughts and actions and is continuously

revealed through our practice. Although attempts can be made to document, it is most directly

experienced through practice and thus requires engagement on our part to utilize it and engaging

with others to demonstrate it rather than to transfer or share it. Because it is embedded in both

thoughts and action and because it requires engagement to be revealed, knowledge development

becomes embodied.

> Deep learning, then, is not a matter of figuring out the truth. Deep learning is the
> embodiment of new capabilities for effective action. Embodiment is a developmental
> process that occurs over time, in a continuous cycle of theoretical action and practical
> conceptualization. The impatient quest for improvements all too often results in
> superficial changes that leave deeper patterns untouched. Herein lays the core leadership
> paradox: Action is critical, but the action we need can spring only from a reflective

stance. A stance that can transform our four human structures: will, cognition, emotion and body (Kofman & Senge, 2001, p. 5).

Due to the design of the initiative, liaisons are engaged in multiple configurations for learning – a learning organization, various learning communities, and a community of practice. Since theses configurations each form a structural context for learning, the liaisons, while embracing the initiative values and their own backgrounds and approaches, engage in their practice by taking with them to each configuration the full awareness of the work. However, it would not be surprising if subtle or major shifts occur as they, from this embodied stance, engage differently based on the structural and relational aspects of each configuration. Their embodied knowledge then is potentially expressed differently in each location as is their evolving understanding of their work and their involvement in it.

For example, the essence of the notion of critical friend is supporting development. One liaison talks about helping to build the "capacity of the Memorial Fund" to "make decisions, consider directions, consider strategies." She described doing this by sharing "subtleties and nuances of what is going on in the community." It is a process of sharing information, a building of capacity because it is an interpretive act of bringing the liaison practice and experience to foundation discussions. In another configuration, when talking about their interactions in supporting learning communities, liaisons talk about encouraging collaborative members to consider different questions about what it will take to get to a desired result. In yet another configuration, their own community of practice, one liaison points to how each of the liaisons comes from a different perspective and that it isn't so much taking away a "technique" but rather "learning how to reflect on things with a different lens" -- asking how another liaison would see it differently.

In each configuration, the liaisons express the essence of critical friend in a slightly different way. Understanding the liaison work in terms of knowledge development then requires asking how is the embodied knowledge of a liaison expressed within various structural configurations and thus how does the knowledge itself manifest differently in those locations. It is expected that through the engagement in various locations, the liaisons also themselves learn through the interaction with others as others express their tacit knowledge. These notions of engagement and embodiment then suggest that crucial to the initiative design is the actual movement of liaisons from one configuration to the other as a necessary approach to *binding together* the full knowledge (including the tacit) of the initiative as a whole. Holding this holistic knowledge is the unique responsibility of the liaison position and moving it throughout the initiative a unique responsibility, essential to the initiative as a whole.

Trust building across configurations

Learning benefits from trust. In order for the liaison work to be effective in terms of demonstrating values and supporting development throughout the initiative, trust must be built in different ways across the various configurations. First the liaisons need to trust the Memorial Fund's integrity to the values and commitment to learning and supporting change. One liaison notes how crucial her experience with the Memorial Fund was as she conveyed that integrity to community. "So I have had that sense about the Memorial Fund enough so that I can feel like I can communicate it to communities."

As well the liaison must trust in and experience the consistency of the Memorial Fund in applying those values and commitment. The consistency is important because, in their interpretive role with communities, the liaisons present and demonstrate their understanding of

the Memorial Fund to communities. For the communities to develop their trust in the intermediary role of the liaisons, they must come to trust in the liaisons in the context of foundation action. Multiple liaisons talk about how trust evolved in their relationship with communities. Communities came to see, through the experience, that the struggles that they revealed to the liaisons did not lead to punitive responses from the foundation.

The time and process for building this trust becomes an area to explore given possible turnover in the leadership of the collaboratives and the need that liaisons discuss to continuously orient new people to Discovery. More important though is the question: will the communities always need to have a trusted liaison providing an interpretive function? Does the learning structure as designed require that the liaisons perform the interpretive task, or by experience, are communities coming to develop that interpretive skill for application beyond the initiative structure?

Dependency and sustainability and the creation of an initiative role

The liaison role is constructed as part of foundation initiative design. Although the work of the liaisons is to support community success, their role is specific to the structure of the initiative and the learning needs of the initiative as whole. Although as long as the liaisons are present, they will always play an interpretive role in relation to the initiative and the foundation, the challenge is to make sure that they do not play that interpretive role in relation to the community work itself in a way that would limit the collaboratives' capacity to effect community change. This requires a skill on the part of the liaisons in differentiating when to serve as interpretation and when to serve as critical friend. Although not made transparent during the liaison interviews, evidence of this skill may be emerging in the interviews. Did liaisons demonstrate a shift in how they addressed questions? When they talked about "giving

permission," were they careful to do so only in relation to the topic of funder relations -- for example letting a community know that the foundation was flexible and that funded plans could change with learning? When they talked about issues related to the collaborative's community work were they careful to remain a critical friend in encouraging collaborative reflection and decision-making?

Analysis has not yet addressed these questions. However, exploring this will help in addressing the most important sustainability question -- whether the liaison role, as an artifact of foundation funding and initiative design has created, over time, a competence or dependency in communities in relation to the community work. A related question is what will happen to foundation learning and the learning in the initiative overall if the consultants who serve as liaisons are removed from the structure?

Critical questioning as essential to understanding structure

Understanding structure is a large part of learning processes.

> The reason that structural explanations are so important is that only they address the underlying causes of behavior at a level at which patterns of behavior can be changed. Structure produces behavior, and changing underlying structures can produce different patterns of behavior. In this sense, structural explanations are inherently generative. Moreover, since structure in human systems includes the 'operating policies" of the decision makers in the system, redesigning our own decision making redesigns the system structure" (Senge, 2006, p. 53).

There is indication from this study that a dialectic process may help in supporting the revealing of structures. Engaging in the liaison research, leads to an understanding that the power of the dialectic process in its ability to reveal structural configurations of a situation. A dialectic learning process is simply a movement from understanding parts to understanding the whole. The world itself is not made up of parts and wholes, rather "we live in a world of socially created distinctions that enable us to act. Rather than trying to "put the pieces together," [we] recognize

that the world shows up for us always already whole" (Kofman & Senge, 2001, p. 15). As liaisons described their practice, they revealed a balance between the questioning that they encouraged about the specifics of community action and collaborative process and the discussions of the "big picture" systems thinking. One liaison described a specific experience with a collaborative wherein the collaborative was attempting to address issues of diversity through various actions. The liaison noticed that they did not have a real clear result in mind and that there attempts had been "episodic." In response the liaison talked with the group about developing " a very early childhood focused result around diversity and equity." In this conversation it was revealed that the community had focused only on the specific acts or parts of the work and had neglected the larger picture of a result that would contribute to diversity and equity. This was obvious but what the liaison also revealed was that her own moving from this part to whole understanding had revealed that the collaborative's approach had been focused only on adults. That all their actions were adult focused was a structural awareness. It was a box that they had placed themselves in, not allowing an exploration of other approaches. It is a box based on deeply held implicit assumptions about the issue being addressed and the ways to approach that issue. These structural aspects of behavior needed to be revealed for change to occur and could be revealed through dialectic question. Through a dialectic process, the realizations of structure were revealed in community even if not explicitly expressed until the liaison's articulation.[11] The possibility of articulation may have been facilitated through participation in a liaison community of practice.

---

[11] Although space does not permit a discussion of the implications of this work to addressing the structural racial and economic disparities embedded within systems, the potential of knowledge development as developed here to lead to structural understandings points to the potential of this work to contribute to initiative design with an equity intent.

Liaison as a skilled perspective for communities of practice

Communities of practice are the "building blocks of a social learning system because they are the "containers" of the competence that make up a system" (Wenger, 2003, p. 80). Communities of practice, as learning configurations, allow identity formation around a concept of shared work, identity through which individuals develop strength and the ability to engage in their practice more effectively. One example of a component of this practice might be the dialectic critique. However, learning systems require sharing across boundaries not just within communities of practice.

> Boundaries are important to learning systems for two reasons. They connect communities and they offer learning opportunities in their own right. These learning opportunities are of a different kind than the ones offered by communities. Inside a community, learning takes place because competence and experience need to converge for a community to exist. At the boundaries, competence and experience tend to diverge: a boundary interaction is usually an experience of being exposed to a foreign competence. Such reconfigurations of the relation between competence and experience are an important aspect of learning" (Wenger, 2003, p. 84).

It is at the boundaries that innovation and learning can occur and through the above discussion of the liaison work, that the value of the liaison role emerges not only as a role but as a skilled perspective. As a role, the liaison concept is the focus of a community of practice itself. However if the notion of liaison is thought of as a *skilled perspective*, encouraging a dialectic critique understanding of the work can perhaps be incorporated into the development of other network members as well. One liaison discussed observing the emerging presence of that skilled perspective saying that "many of the coordinators now are much more comfortable going to other tables in their respective communities and representing Discovery." The liaison noted that these coordinators do not wait for others to come to the Discovery meetings but rather serve as a "liaison themselves between work at the Discovery table and work at these other tables, these other collaboratives, these other groups." Through the understanding of the liaison work as a

skilled perspective, it may be possible to incorporate that learning into capacity building for

others who can then engage in the necessary work of *binding together* knowledge within an

initiative – with binding together as the essence of the notion of liaison. in this way the work fo

liaison can be embraced as a function of a learning network rather than the role of individuals

and thus capable of being distributed across the network itself.

Conclusion as future research and initial implications for system building

The above dimensions of learning as situated within and between various configurations

have implications for the design of social and policy change initiatives. There is much more that

can be learned through exploration of the liaison work. Coupled with the above analysis of the

liaisons' meaning making, analysis of the data that takes an ethnomethodological focus can

further the understanding of the *processes and structures* of liaison meaning making. Additional

analysis of this data can also focus on understanding how the liaisons engage across the various

settings of the learning organization and learning communities and the impact that being

involved in a community of practice has on their ability to do this. These two facets of analysis,

will help to illuminate the learning about utilizing various learning configurations in initiative

design and about supporting members to engage in liaison behavior that serves to bring together

that knowledge within an initiative.

However, the implications for this work go further than initiative design to another

potential purpose of social and policy change initiatives – that of system building. If we look

beyond the actual funded initiative, the understanding of the essence of liaison work has

additional import. Systems that function within a fast-paced society, where contextual factors

shift with social, political and economic changes, require continuous learning and behavior

adjustment to occur oftentimes in very deeply structural and practice based ways. Learning can

occur within various configurations, but innovation often occurs at and across boundaries.

"Individuals inquire on behalf of the system. The system learns when designated members

recognize and use this learning to change mental models, culture, structure, and agreed practices"

(Marsick et al., 2000, p. 10). In order for a system to benefit from learning, it must be supported,

surrounded, infused, and prompted by a learning network that brings together the individuals that

socially construct from within and outside that system.[12] Where racial and economic disparity

are considerations, there must be a value based and structural approach to that learning network

in order for change to occur that addresses institutionalized and deeply embedded patters of

inequity.

Learning networks can be home to learning organizations, learning communities, and

communities of practice and can serve as an overarching space where members focus on the

contributions of their particular work, their own agency, and their individual and collective

accountability. If designed as such, a learning network can embrace the skilled perspective of

the concept of liaison in order to enable members to bind together network knowledge across the

various learning configurations. The liaison concept, in its notion of binding together learning

has import then to how we come to understand the skills and perspective needed to build learning

networks. Through what we now know about configurations of learning as they exist in

learning networks and the need for learning networks to be present to support systems, we can

say that system building in part is supporting the system based meaning making of participants,

across stakeholder groups, professions and organizational structures. Thus knowledge

development, as an embodied endeavor where practice reveals and encompasses both thought

---

[12] The Memorial Fund has commissioned a study by Dr. Cathryn Magno exploring the liaisons as one learning configuration amongst learning communities and how the Memorial Fund's support of learning has begun to contribute to a learning network across the state.

and action, has implications for the design of social and policy initiatives that focus on system building.

Social and policy change operates through network learning systems, but systems are the actual structural mechanisms that institutionalize practice that is the manifestation of change. Social and policy change efforts are not new philanthropic endeavors. However, traditional approaches are limited. Often framed in terms of participatory planning processes, these approaches have brought together members based on interests, neglecting both the power of communities of practice that bring together people based on an identity of shared work, and the potential of shared work operating across boundaries to prompt network learning that is grounded in structural awareness.

As is the case in early childhood education, a loosely linked field has grown up around the issues facing young children and within the milieu of various other social service systems. Much work has been done in encouraging conceptual understanding of early care and education system formation, some of it focused specifically on the field building component of this work, some on ideas of leadership, and some drawing from traditional participatory planning processes espoused to affect change. The exploration into the role of liaisons in the Discovery initiative, as a social and policy change initiative, revealed that learning operates in part through the structures of the various learning configurations of learning organizations, learning communities and communities of practice. The study also reveals that this understanding of liaison as a skilled perspective can go even further in helping us to actually create a system through and supported by the action of a learning network that actually enables change to occur at a structural level. Within the context of system building, there is a need to develop communities of practice that support participants learning together as they develop new identities of their work as

professionals and/or civic engagers working betwixt and between learning configurations and as

critical questioners of the institutionalized structures that perpetuate racial and economic

disparity. Through this knowledge development, new systems will come forth as a learning

network emerges to surround, support, and continually energize the construction of those

systems.

_____

Works cited

Barab, S., & Duffy, T. (1998). *From practice fields to communities of practice*. Bloomington IN:
        Center for Research on Learning and Technology.

Cook, S. (1999). Bridging Epistemologies: The generative dance between organizational
        knowledge and organizational knowing. *Organization Science, 10*, 381-400.

Cox, A. (2005). What are communties of practice? A comparative review of four seminal works.
        Journal of Information Science, 31(6), 527-540.

Creswell, J. (1998). *Qualitative inquiry and research design: Choosing among five traditions*.
        Thousand Oaks: Sage Publications.

Fontana, A., & Frey, J. (2000). The interview: From structured questions to negotiated text. In N.
        Denzin & Y. Lincoln (Eds.), *Handbook of Qualitative Research* (Second ed., pp. 645-
        672). Thousand Oaks Sage Publications.

Glesne, C. (2006). *Becoming qualitative researchers: An introduction*. New York: Pearson.

Hugo, J. (2002). Learning community history. *New directions for adult and continuing
        education, 95*, 5-25.

Humphries, B., & Martin, M. (2000). Unsettling the 'learning community': from 'dialogue' to
        'difference'? *Community, Work and Family, 3*(3), 279-295.

Janesick, V. (2000). Teh choreography of qualitative research design: Minuets, improvisations,
        and crystallizations. In N. Denzin & Y. Lincoln (Eds.), *Handbook of Qualitative
        Research* (Second ed., pp. 379-399). Thousand Oaks Sage Publications.

Kilpatrick, S., Barrett, M., & Jones, T. (2003). *Defining learning communities*. Paper presented
        at the Australian Association for Research in Education: International Education
        Research Conference.

Knutson, K., & Miranda, A. (2000). Leadership characteristics, social interest, and learning
        organizations. *The Journal of Individual Psychology, 56*(2), 205-213.

Kofman, F., & Senge, P. (2001). *Communities of commitment: The heart of learning
        organizations*. Cambridge: Organizational Learning Center, MIT.

Lesser, E. L., & Storck, J. (2001). Communities of practice and organizational performance. *IBM
        Systems Journal, 40*(4), 831-841.

Lincoln, Y., & Guba, E. (2000). Paradigmatic controversies, contradictions, and emerging
        confluences. In N. Denzin & Y. Lincoln (Eds.), *Handbook of Qualitative Research*
        (Second ed., pp. 163-188). Thousand Oaks Sage Publications.

Lyons, P. (2008). The crafting of jobs and individual differences. *Journal of Business Psychology, 23*, 25-36.

Marshall, C., & Rossman, G. (1999). *Designing qualitative research*. Thousand Oaks SAGE Publications.

Marsick, V., Bitterman, J., & Veen, R. v. d. (2000). *From the learning organization to learning communities toward a learning society*. Columbus: Center for Education and Training for Employment.

Maxwell, J. (1996). *Qualitative research design: An interactive approach*. Thousand Oaks: Sage Publications.

McDermott, R. (2000). Knowing in Community: 10 critical success factors in building communities of practice. *International Association for Human Resource Information Management, 4*(1), 19-26.

Peltonen, T., & Lamsa, T. (2004). 'Communities of practice and the social process of knowledge creation: Towards a new vocabulary for making sense of organizational learning. *Problems and perspectives in management*, 249-261.

Potter, W. J. (1996). *An analysis of thinking and research about qualitative methods*. Mahweh NJ: Lawrence Erlbaum Associates.

Rubin, H., & Rubin, I. (1995). *Qualitative interviewing: The art of hearing data*. Thousand Oaks: Sage Publications.

Schwandt, T. (2000). Three epistemological stances for qualitative inquiry: Interpretivism, hermeneutics, and social constructionism. In N. Denzin & Y. Lincoln (Eds.), *Handbook of Qualitative Research* (Second ed., pp. 189-213). Thousand Oaks Sage Publications.

Senge, P. (2006). *The fifth discipline: The art and practice of the learning organization*. New York: Currency Doubleday.

Shank, G. (2002). *Qualitative research: A personal skills approach*. Upper Saddle River NJ: Merrill Prentice Hall.

Stephens, S. A., & Studdiford, D. (2009). *The Discovery Initiative 2004-2007: Interim summative evaluation report*: Center for Assessment and Policy Development.

Weick, K. (1995). The nature of sensemaking. In *Sensemaking in organizations* (pp. 1-16). Thousand Oaks: Sage Publications.

Wenger, E. (2003). Communities of practice and social learning systems. In D. Nicolini, S. Gherardi & D. Yanow (Eds.), *Knowing in organizations: A practice based approach*. Armonk New York: M.E. Sharpe.

Wenger, E. (2008). *Communities of practice: Learning, meaning, and identity*. New York: Cambridge University Press.

Wrzesniewski, A., & Dutton, J. (2001). Crafting a job: revisioning employees as active crafters of their work. *Academy of Management Review, 26*(2), 179-201.