Coming of Age in the Information Age

Pew Partnership for Civic Change
July 2000

THE PEW PARTNERSHIP is a civic research organization. Our mission is to identify and document promising solutions in five areas crucial to strong communities:

- Healthy children and families
- Thriving neighborhoods
- Living-wage jobs
- Viable economies
- Collaborative leadership

Our action research explores how innovative partnerships, citizen participation, and accessible technology catalyze civic solutions in these areas. We disseminate practical information about what works to citizens and practitioners everywhere.

We test problem-solving strategies in communities across the nation through three initiatives: *Wanted: Solutions for America*, the *Pew Civic Entrepreneur Initiative (PCEI)*, and the *Civic Change Project.*

Established in 1992, the Pew Partnership for Civic Change is funded by The Pew Charitable Trusts and administered by the University of Richmond.

ACKNOWLEDGEMENTS

The Pew Partnership sincerely thanks all the focus-group participants for their active and enthusiastic participation in the discussions.

ABOUT THE AUTHORS

Jacqueline Dugery, director of program research at the Pew Partnership, spearheaded the research and analysis for this report. Juan Sepulveda, president of The Common Enterprise, both facilitated the discussions and cogently captured the initial focus group findings, many of which are included here. Carole Hamner, deputy director of the Pew Partnership, provided thoughtful insights and editorial assistance.

OVERVIEW

We live in an information age that is transforming the prospects of communities and nonprofit organizations. Inboxes, both real and virtual, are often overflowing with information from think tanks, foundations, national organizations, university research centers, and others about what works to strengthen communities. Thanks to the Internet, information that recently would have required a few phone calls or a trip to the local library is now at our fingertips. However, simply increasing the quantity and accessibility of information does not guarantee that those who need the information will capitalize on it. Nonprofit organizations are no exceptions.

In October of 1999, the Pew Partnership launched a series of focus-group conversations with nonprofit leaders as the first phase of a national research initiative to provide community practitioners with accessible, reliable information about "what works" to build stronger communities. Exploratory in nature, the primary goal and purpose of the three focus groups was to "know our customer"—to learn more about how nonprofit organizations access the information they need to improve their work and better their communities. These insights will be used to help the Pew Partnership and others reassess how best to assist nonprofits with their learning needs.

The target audience for the focus groups was small to mid-sized community-based organizations that provide direct services to their communities. The participants represented organizations that were not solely established nonprofits nor were they completely brand new groups. Collectively, the selected organizational leaders represented a cross-section of issue areas relevant to the Pew Partnership's work. For example, participants worked in job training, affordable housing, workforce development, youth development, and other issues.

The groups were asked a series of questions that fell under the following categories:

- Current learning approaches and activities used by nonprofits
- Ways organizations manage and apply information to strengthen their organizations and better serve the community
- Kinds and types of information most useful to nonprofits
- Ways nonprofits become better learners
- Impact of the new technologies on nonprofit organizations
- Preferred ways nonprofits receive information

KEY FINDINGS

Finding One

The day-to-day realities of running a community-based organization make it extremely challenging for nonprofit leaders and their staffs and boards to tap into and use the vast array of information that is now available to them from an ever-growing range of sources. Most nonprofits know they should be learning more and thus are missing out on important information for their organization.

Finding Two

Mot nonprofits have not integrated a systematic learning or knowledge-management process into their organizational culture. Instead, most nonprofits described their organizations as places where periodic learning takes place—a hybrid of continuous and just-in-time learning.

Finding Three

In the nonprofit world, learning is often exclusively equated with program-evaluation activities or organizational-development issues.

Finding Four

Effective data collection and outcome measurement are significant challenges for many nonprofits. In addition, there is a disconnect between funders and nonprofits in terms of the purpose of data collection and what data are useful.

Finding Five

In terms of information, nonprofits are hungry for the "real story." They want to hear about the struggles, failures, obstacles, and barriers others faced, not just the seamless success story.

Finding Six

Nonprofits see a role for a knowledge broker—someone who can routinely sift and sort through all the available information and give them the most relevant and valuable nuggets.

Finding Seven

Most nonprofit leaders view the new technologies as invaluable tools for their organizations, though with regard to the Internet most of them do not use it very often, except for e-mail.

Finding Eight

For most nonprofit leaders, direct one-on-one contact with someone they trust is the most preferred way of accessing the information they need.

Finding Nine

Direct service providers allocate learning time to improving existing programs, dealing with organizational-development issues, and searching for new funding opportunities.

METHODOLOGY

Sample

Planning and coordination of the three focus groups were handled by the Pew Partnership. For all groups, our target audience was executive directors of small to medium-size community-based organizations that develop and provide direct services across several issue areas. We attempted to identify leaders of organizations that were not solely established nonprofits nor were they completely brand new groups and that had an established grass roots presence.

In each city, we collaborated with individuals to recruit and screen potential focus-group participants. The screening role for the San Antonio, Texas, focus-group conversation was done by Juan Sepulveda, president of The Common Enterprise. In St. Louis, Missouri, Debra Moore, director of citizen engagement of FOCUS, spearheaded the screening process. Hathaway Ferebee, executive director of the Baltimore Safe and Sound program, assisted by Cheryl Casciani, director of programs at the Baltimore Community Foundation, coordinated the screening function in Baltimore, Maryland. Once identified, participants were invited by letter to attend the focus group.

A total of 36 panelists participated in the sessions. Participants represented social service agencies, civic and social organizations, and educational institutions as well as a host of community issues including job training, affordable housing, youth development, and others. Program services ranged from a storefront after-school program with three staff, to a sixty-year old organization working citywide, to a regional youth-development program with a national affiliation. In addition to organizational and issue variation, we sought to assemble an appropriate mix of individuals that varied according to age, work experience, race, and gender.

Procedure

A total of three focus-group discussions were held:

- San Antonio, Texas, on October 25, 1999;
- St. Louis, Missouri, on December 14, 1999 and
- Baltimore, Maryland on March 16, 2000.

A discussion guide describing the issues to be covered by the focus group was developed as a framework for each session. The baseline questioning for each focus-group conversation centered on the following major topics:

- Current learning approaches and activities used by nonprofits
- Ways organizations manage and apply information to strengthen their organizations and better serve the community
- Kinds and types of information most useful to nonprofits
- Ways nonprofits become better learners
- Impact of the new technologies on nonprofit organizations
- Preferred ways nonprofits receive information

Questions were sequenced to evolve from the general to the specific. Participant were urged not to edit their responses and to give examples whenever possible. They were also reminded that it was not necessary for the group to reach consensus nor was it necessary for people to disagree. Focus-group participants were also asked to react to different sets of materials. The discussion guide and presented materials can be found in Appendix A.

Juan Sepulveda moderated the three focus groups and documented the process. Pew Partnership staff served as observers and rapporteurs. Each session lasted approximately two hours and was audiotaped and transcribed.

SUMMARY OF FINDINGS

While each focus groups revealed a unique story, the following findings are the larger overall themes that were generated across the three discussions.

Finding One

The day-to-day realities of running a community-based organization make it extremely challenging for nonprofit leaders and their staff and boards to tap into and use the vast array of information that is now available to them from an ever-growing range of sources. Most nonprofits know they should be learning more and thus are missing out on important information for their organization.

Across the board, focus-group participants talked about the dramatic increase in access they have to all types of information. Yet, this access has been stifled by the pressing day-to-day responsibilities of operating a nonprofit organization. While information overload is an issue for many individuals, government agencies, and businesses, the nonprofit sector is experiencing an exaggerated form of helplessness because of its own operating environment.

In the nonprofit world, particularly on the small to mid-sized groups we brought together, there is never enough time, resources, or staff to tackle the community issues facing these organizations, let alone the time, resources, or staff to spend on learning ways to improve their work. For all the energy and effort being spent by research organizations, foundations, and others on producing and disseminating different forms of information for community practitioners, chances are very high that the reports being sent or posted on the Internet are languishing unread in a pile somewhere.

As one participant commented, *"I'm not sure that the access to information is paying off for us the way we need it to pay off. What happens is you're so busy running day-to-day operations in addition to needing the information and what happens is that it [learning] always seems to take a second seat."* Another participant added, *"Information overflow for me is really dramatic. I don't have piles on my desk. They are behind me now. I cleared off the desk so I could at least see the people."*

In spite of challenges with managing information overload, many participants attested to the inherent value in accessing information. One nonprofit leader stated, *"We're one of the grantees of an initiative which is [foundation] funded. They, on a regular basis, send out these things they call "care packages" which are full of really wonderful reports that I dread getting because they just sit."* Another participant, who formerly worked in academia said, *"I know the importance and how critical it is to gather new information from other resources so that wheels are not reinvented. As a practitioner, I find that this is not practical because of the lack of resources."*

Finding Two

Most nonprofits have not integrated a systematic learning or knowledge-management process into their organizational culture. Instead, most nonprofits described their organizations as places where periodic learning takes place—a hybrid of continuous and just-in-time learning.

When first queried about learning within their organization, the initial response for many nonprofit leaders was to describe their organizations as ideal places where learning was an on-going, continuous part of how they did business. However, when participants were asked to describe how learning is operationalized—how it actually takes place in their organizations—few could cite specific examples or strategies. Barriers such as time, staff, and "open-door" policies for clients precluded the development of structured and routine learning processes. As the conversations progressed, most nonprofits agreed that they were, at best, sporadic learners.

This point was reinforced later in the discussion when participants were asked to describe the type of learning that takes place in their organizations. Three choices were presented:

- Continuous learning—where learning is an on-going process that constantly takes place in all the nonprofit does and can look at the long-term needs of the organization.
- Just-in-time learning—where learning happens just in time before problems set in, but rarely with an eye toward the long-term issues of the organization.

- Crisis learning—where the nonprofit is facing major challenges and has no choice but to come up with some sort of solution, even if it is only temporary.

At the first focus group, participants quickly added the category of periodic learning to the list of choices. They generally described this category as falling somewhere between continuous and just-in-time learning. They felt this addition best captured the erratic, up-and-down nature of learning that takes place in their organizations. Periodic learning also seemed to capture the breadth of learning possibilities and the various intensities of the learning process.

In spite of constraints, nonprofits manage to eke out some time to learn. Participants cited intermittent instances of both internal and external learning. Internal learning strategies most often mentioned were staff meetings and trainings and strategic-planning work. External learning—proactively seeking out sources of information outside the organization—took the form of client/constituent surveys, hosting of neighborhood meetings to garner information from residents, and interagency dialogue.

Finding Three

In the nonprofit world, learning is often exclusively equated with program-evaluation activities or organizational-development issues.

Early on in each discussion, we asked group members to describe learning within their organization. Almost instinctually, participants immediately began discussing data collection, analysis, and reporting methods and their various challenges and strengths. Learning and information were associated with tracking client services, gathering demographic information, and overcoming hurdles related to data-management information systems.

"We try not to invent the wheel so we try to use data...our problem is we don't have time."

"You spend all your infrastructure time on getting those reports and those numbers and figuring out what trends are underneath and what kinds of important pieces of data that you can go back with to plan and actually build programs."

"We're very data driven and we have a fairly sophisticated client-tracking system that produces a lot of data for us. So we spend a lot of time reviewing our data to see what that tells us in terms of not just how many people came through the door, and how many attend groups and that sort of thing, but we're also able to link that data with vital statistics and look at our outcomes and see if our outcomes...If we're achieving what we want to."

Part of the discussion around learning activities also veered toward issues of organizational development. Participants introduced fundraising, strategic planning, reevaluating mission statements, and board development as key dimensions of learning.

Finding Four

Effective data collection and outcome measurement are significant challenges for many nonprofits. In addition, there is a disconnect between funders and nonprofits in terms of the purpose of data collection and what data are useful.

Data were a major topic of discussion for our focus-group panelists from not just a learning perspective but also a funding perspective. For nonprofits, data are playing a more central role in the increasing competition for funding. The increased emphasis on producing hard data to show results has caused a number of challenges for direct service providers. Nonprofit groups feel unprepared or underqualified to handle the increasing emphasis on outcome measures.

The first major challenge is centered on the question of how to collect data efficiently and incorporate it into the organization's day-to-day activities. Participants felt that many funders' pursuit of outcomes has not been matched with the resources or training that nonprofits need to do this function well. Data collection is labor intensive and in some cases compromises their ability to deliver services. As one practitioner said, *"Data collection, data evaluation or assessment, data reporting takes a lot of time and there are costs involved. And, when you receive grants, you have to put all this stuff together, and so frequently, the amount of money spent on all that data information, and sending an analysis, and massaging and so on, takes away from the program. From the people we're trying to serve."* Another added, *"...you have to take into consideration the actual collection of the data, the time of staff to help with the collection of the data. The director and the administrator for the correspondence that has to go back and forth on it. Then, whatever technical assistance you're going to need. Then of course reports aren't going to be right the first time and you'll have to keep going back through it. So, it's this tradeoff of what does it cost to get information, particularly for direct service providers."*

Second, it is not only the process of information gathering, but also the purpose behind it that causes splits between grantors and grantees. As grantees, many nonprofits feel as if the data-collection process is nothing more than an attempt by funders to show that an initiative either worked or failed—essentially a thumbs-up or a thumbs-down approach. In that sense, it is merely an after-the-fact evaluation tool. While evaluation tools are necessary, nonprofit practitioners believe these evaluation devices can actually be used to help the nonprofit during and not just at the completion of a program or funding cycle. As one nonprofit leader said, *"Good data for us is not summative. It's the continuous data that allows you to look at what you are doing and make the modifications along the line. And I think...funders are still looking for the absolute. After the program is over, tell me did it work. And of course, I'm going to make it work on paper because I need to be able to go back to that funder again versus a funder who might say, tell me the process in which you are doing the evaluation. Tell me what changes you've made because of that information, and that in fact, is that I'm going to support because that sets a process in place that continues over time when the funding runs out because you now have a new mind-set and behavior patterns with a new organization. That's what I would call good data. Bad data is the summative."*

A third challenge for nonprofits, particularly those that are involved in neighborhood organizing or community building is that much of the work they do is hard to quantify. One participant gave an example, *"You can't document when you get a three-year-old child who's been addicted, who was born addicted, and who could not tie his shoes and then six months later, you get him to tie his shoes. So, that takes away from what it is that we do."* Another practitioner added an even tougher causation problem, *"How do you talk about what you've done in terms of the indirect, the capacity building, and not minimize what you've done but not exclude the outside influences that have an effect as well?"*

<u>Finding Five</u>

In terms of information, nonprofits are hungry for the "real story". They want to hear about the struggles, failures, obstacles, and barriers others faced, not just the seamless success story.

While most nonprofit leaders feel there are meaningful pieces of information to be found in the avalanche of publications they receive, they also believe most of these sources, particularly best practices and case studies, only tell half the story.

Competitive funding environments don't allow nonprofits to be completely honest about the struggles they have faced. Nonprofit leaders feel they can't tell their complete stories without jeopardizing their current or potential fundraising abilities. *"It's hard to share mistakes because you don't want people to label you as an executive director of a bad board,"* one practitioner said, *"There's an extremely huge risk in being too honest. Others can interpret it in a sensationalistic way."*

This pressure to show that you have been successful leads to conference presentations and publications that highlight "success stories" that are exaggerated, that seem to have occurred with little to no struggle. What nonprofits want is candor. They want to hear all the obstacles, challenges, barriers, setbacks, and problems groups have faced so that they can try to avoid making the same mistakes. Without such information, the credibility of the story is diminished and is not likely to have much impact on the reader.

Finding Six

Nonprofits see a role for a knowledge broker—someone who can routinely sift and sort through all the available information and give them the most relevant and valuable nuggets.

The overwhelming strain nonprofits feel from their day-to-day work and their inability to find enough learning time leads them to want knowledge brokers that can assist them. Knowledge brokers are defined by nonprofit leaders as individuals or groups who take on the responsibility of sifting through the information flood and finding the most relevant and credible pieces for their organizations.

Currently, most direct service providers don't feel they have the time to play this role effectively or have access to someone with such a job description. In the course of discussion, participants volunteered several possibilities of how this role could be filled. One option is to have local coalition partners working on the same set of issues serve as the knowledge broker for the entire group of nonprofits. By sharing the responsibility across a number of groups, the entire coalition could gather and learn from each other, both in terms of their own personal experiences and from what they are reading and gathering from outside sources. In short, the coalition becomes a community of learners.

Alternatively, nonprofits can reshape their organizations so that there is a staff member or group of individuals that takes on this knowledge broker role. A handful of nonprofits described how they formally charged all staff members with the responsibility of playing an on-going learning role where staff took turns teaching each other about a subject that they had identified as a whole. Whether it's one staff member, a group, or all staff personnel, the focus was on learning from within the organization by formally acknowledging that this is an important piece of the job descriptions for these positions.

Finding Seven

Most nonprofit leaders view the new technologies as invaluable tools for their organizations, though with regard to the Internet most of them do not use it very often, except for e-mail.

Nonprofits are not luddites when it comes to technology. Across the board, most nonprofit leaders agreed that the new technologies are positive, powerful additions to their organizational operations. When we asked if the new technologies were a good thing, one practitioner quickly proclaimed, *"It's a small dunk. Yes, it's better. It's the kind of investment you can't afford not to make."*

Anecdotal stories of increased efficiency sprang forth from the groups. Many mentioned the introduction of accounting software as an example of a new technology that has resulted in a decrease in staff time to perform these operations while simultaneously increasing the range of financial reports that they can produce. Others mentioned the ease and speed of group e-mails as a better way to instantly communicate and update board members, staff, and other key individuals. Several talked about their sophisticated client-tracking systems that allow them to allocate their resources more efficiently and better serve their customers. In short, the new technologies were seen as invaluable tools that would only get better as time moves forward.

In terms of Internet use, nonprofit leaders felt the same—the Internet is and will continue to make their organizations stronger and more effective. For example, one participant described a "before and after" scenario:

"...for one of our programs, the Meals on Wheels Program, we were looking at the effectiveness of the program and also trying to see what the trends are around the country in the Meals on Wheels program. There was a time when you would just write for travel expenses or whatnot and you would go visit other places. I was able to do that with our program coordinator over the Internet...you visit several different cities and locales and find out about their Meals on Wheels program. That's a tremendous savings."

Yet, when we asked the nonprofit leaders how much time they actually spend on the Internet, most admitted that they did not use it very often. Many focus-group participants said they used the Internet anywhere from a half-hour to an hour and a half daily. There were a number of practitioners who are connected, but only log on a few times a week, primarily to check their e-mail boxes. Another handful are not yet connected to the Internet, but are planning to do so soon, and there were several practitioners who use the Internet more frequently at a reported rate of two-to-four hours a day.

In addition, several nonprofit leaders said they do not use the Internet during regular business hours. They only use it at night, after work hours, or early in the morning, before they start their days. In either sense, they have not built it into their work routines. It is the type of activity that they do after they finish their work or before they rally start their day's activities.

E-mail was the top use of the Internet for nonprofit leaders with research a distant second. It was apparent that most of the nonprofit leaders wanted to be seen as being connected to the Internet world, yet most of them have not invested the amount of time necessary to make the Internet a hassle-free, effective vehicle, outside of e-mail. As one practitioner said, *"That line about it's a million miles wide and a foot deep, is the hassle. Looking through it sometimes is the pain."* Many others echoed this sentiment. For them, their time on-line has been frustrating and less then satisfying.

Finding Eight

For most nonprofit leaders, direct one-on-one contact with someone they trust is the most preferred way of accessing the information they need.

Both in discussions and as a reaction to presented materials, most nonprofit leaders preferred receiving information in a direct one-on-one contact, particularly from people and organizations that they know well and trust. The two contacts that seemed to elicit the most trust were contacting another nonprofit agency and contacting a parent organization. Almost all of the focus-group participants said they have contacted other nonprofits for information and most groups that have a parent organization have done the same.

"The best kind of learning for me happens more one-on-one. I don't go to a lot of conferences because we don't have the opportunity, and I usually don't find that that's very helpful, but on the occasion where I do go, the most helpful learning is where you have direct contact with somebody. You really have the opportunity to learn about what they are doing, and it tends to stick better with me...than reading something."

There are a number of reasons given for this preference. First, a trusted source is crucial when the goal is to receive blunt, straight-talking advice. The ability to sit down with someone they know and trust gives them the advantage of being able to be open and honest. Direct contact also allows the nonprofit leaders the opportunity to customize the conversation specifically to those items that matter most to them. They can cut to the chase and efficiently spell out their concerns. Last, direct contact is valued for building lasting bonds between individuals and organizations, especially if each participant has the chance to both give and receive information.

Other nonprofit agencies seem to be a natural source of information because they intrinsically deal with many of the same sets of issues. Likewise, parent organizations also are seen as invaluable because they are constantly collecting information on the nonprofits that make up their network and these groups share similar structures and challenges.

The nonprofit leaders in these focus groups also said they contacted government agencies, academics, and experts for information. While these contacts were not as frequent as their connections with other nonprofits or with parent organizations, they were valued for access to important data, rules and regulations, or a specific body of knowledge or research.

For-profit businesses were rarely contacted for information and when they were, it was typically for a specific expertise such as accounting or bookkeeping or for fundraising possibilities. There was very little effort among these direct service providers to seek out information and advice from for-profit businesses on the larger organizational-development and process questions.

Finding Nine

Direct service providers allocate learning time to improving existing programs, dealing with organizational-development issues, and searching for new funding opportunities.

Echoing earlier comments about learning, most direct service providers we surveyed say they spend most of their limited learning time focusing on improving existing programs they operate, not on developing new programs. While many nonprofits would relish the opportunity to develop new programs to tackle other issues facing their communities, they already have their plates full with the current set of programs they are delivering. As a result, they direct their learning to incrementally improving the programs they have as opposed to seeking out new programs to offer.

Improving existing programs was also a catchall category for organizational-development issues facing their organizations, not on the actual community issue itself. What this means is that while the programs themselves are addressing specific community needs such as job training, after-school care, or literacy, most of the nonprofits are channeling their learning efforts into organizational-development issues such as strategic planning, communications skills, mission development, and professional development. Nonprofits are not spending much time learning, for example, how to run a better job-training program or deliver a more effective after-school program. They are focused on learning organizational basics—how to manage an organization, how to train and retain staff, how to create a strong board.

Not surprisingly, the on-going search for new funding opportunities also occupies a great deal of time for nonprofits. While the "learning" involved is more along the lines of collecting information, this activity is a constant for most of the nonprofit leaders we surveyed.

SUMMARY AND NEXT STEPS

Some of the findings point to issues that the nonprofit and for-profit sectors grapple with alike—time management, organizational development, staying on top of new technologies. However, more interesting is what the findings suggest as a snapshot of where the nonprofit sector is with respect to managing the information age.

To those who target the nonprofit sector with information, the findings may present a dismal scene. Focus-group participants painted a picture of nonprofits struggling with information overload and lacking the tools and time to efficiently manage learning and knowledge within their organization. Absent adequate support and resources, nonprofit practitioners must prioritize internal issues—mainly organizational development and data management—in order to stay afloat. They are keenly focused on such issues because they speak to the urgent need to better understand their identity as an organization—who they are serving, what their mission is, where the organization needs to be in the next five years. They also address the immediate need to be accountable to funders and other stakeholders. This step can necessarily override any systematic attempt to look externally—to dig deeper in order to access best practices, to research cutting-edge programmatic strategies, to stay on top of emerging trends in the field.

If this is the case, then the picture becomes a bit brighter. It then seems logical that the practitioners are focused on the nitty gritty internal issues—client-tracking systems, analyzing program data, strategic planning, staff training, not to mention fundraising—before tackling the larger external issues. Only when they are confident that these areas are sufficiently developed can they begin to think broadly about accessing information for other purposes. The picture brightens even more once we factor in the level of self-awareness among the participants. Nonprofits are cognizant of the consequences of myopic learning. They are also aware of the tremendous potential of information to improve their work and thus their communities. In other words, they are willing and potentially enthusiastic learners.

This presents several opportunities to those who create and disseminate information to nonprofits. The first is to further investigate and test the best vehicles and products that will meet the current needs of nonprofits. We have an idea bout the barriers facing nonprofits, but less information about specific tools and strategies that will complement their needs. The second, and bigger challenge, is to develop strategies that support nonprofits' capacity to manage knowledge and learning over the long haul. And third, there is an opportunity to segment types of information that speak to particular program and organizational needs while concomitantly creating a "big picture" scenario.

We know that the information age is here to stay. We also know that information alone is not the issue. As we jump on the information highway we must be sure that we have vehicles to travel in and that they are going in the right direction.

APPENDIX A: DISCUSSION GUIDE

<u>Welcome and Background</u>

Carole Hamner/Jacqueline Dugery, Pew Partnership for Civic Change

Primary Goals and Purposes

To meet with community-based organizations to learn more about how they access the information they need to improve their work and better their communities.

Focus-Group Panelists Description
Juan Sepulveda, The Common Enterprise

Example: Fourteen community-based organizations from across San Antonio that work in different areas including housing, job training, workforce development, youth development, health care, neighborhood work, and other areas of interest.

<u>Introductions</u>

Explanation of Process

Roles: Notetakers and Facilitator
Process: Three focus-group conversations in San Antonio, Texas; St. Louis, Missouri; and Baltimore, Maryland.
Product: Report of findings will be used to help guide the Pew Partnership as it moves forward in helping community-based organizations obtain access to helpful information.

Ground Rules
- A few ground rules that are useful to this kind on conversation. If you agree with them, we'll go with them, and if you don't, we'll negotiate.
- One nonnegotiable: You're being taped because my memory won't cut it and if I take notes while I'm here then I'm not here.
- Take Risks, Be Honest and Don't Edit
- Ideal situation for us: If everything that comes into your mind comes out of your mouth
- Don't think "wrong"—any reaction you have is right
- Don't think "unimportant"—any reaction is important
- Speak one at a time: Taping doesn't work if two people are talking at the same time. Hold your thought and I'll get back to you
- Feel free to disagree: Besides saying what comes into your mind, I want you to feel free about responding to whatever anyone else says. You don't have to agree. If someone says something and you all sit there nodding and smiling, I'll assume that person is speaking for the group. So, if someone says something and they're not speaking for you, say so. If a fist fight breaks out—I'll interrupt it, but anything short of that is controversy, and it's fine.

<u>Outline of Key Areas/Questions</u>

Information/Learning Attitudes and Culture
How many of you would describe your organizations as places where learning and gathering information are important parts of the way you operate?
- For those who said yes, how is learning and gathering information valued and rewarded in your organization?
- For those who said no, are there any examples of learning or gathering information, no matter how rare, that take place in your organization?
- Time: Do you have enough time (or any time, even if it's not enough time) to think about learning and gathering information?
    - If so, what do you use that time to learn or seek out?

    - Develop new programs? Improve existing programs? Content in your issue areas? Process in your issue areas?
    - Organizational-development issues?
  - If not, what are you using your time for?
- Who gets to learn in your organization? The executive director? The top staff alone? All employees? Your board members? Your other supporters, including funders? Your customers? Clients?
  - Are there particular staff members in charge of learning and gathering information for the organization?
- How do they learn? Describe how learning and information needs are dealt with at the:
  - Individual Level
  - Group/Team Level
  - Organizational Level
  - Alliance/Coalition Level (beyond your own organization)
- How would you describe the type of learning and information gathering that takes place? Is it:
  - Continuous learning?
  - Just-in-time learning?
  - Crisis learning?
  - Something else?

Information/Learning Content/Knowledge Management

- What kind or type of information is most useful to you as you:
  - Develop new programs
  - Improve existing programs
  - Try to change the way the organization operates
  - External Collection of Information: If participants do not offer the following, we might want to use a series of presented materials that includes:
    - Summaries of current thinking and research about "what works" in their issue area
    - Case studies of promising programs
    - Specific information about budget and implementation of other programs
    - How-to guides or workbooks about pursuing specific strategies or approaches
    - Accessing web sites
    - Contacted a parent organization
    - Contacted another nonprofit agency
    - Contacted government agencies
    - Contacted for-profit businesses
    - Talked with others/networked
    - Attended conferences
    - Attended trainings
    - Contacted experts in the field
    - Contacted an issue clearinghouse
    - Professional journals or newsletters
    - Other publications
    - Subscribed to or signed up with a listserv
    - Other types of information
    - Have them name particular ones that are most useful to them as examples
- What works with the information you collect that is most useful to you?
- What doesn't work with the information you collect that is most useful to you?
- What doesn't work with the information you collect that isn't the most useful to you?
- Does anything work with the information you collect that isn't the most useful to you?
- These different types of information would be even more useful to you if they included _______.

New Technologies

- Are the new technologies a blessing or a curse for your information needs?

    - If blessing, give examples
    - If curse, give examples
- Is your organization connected to the Internet?
    - If yes, has the Internet helped you gain better and more useful information?
    - Do you personally use the Internet? How often? For what tasks?

Knowledge Management: Internal Collection
- How does the staff learn from each other?
- How does the organization learn from its staff?

Knowledge Management: Knowledge Creation
- How does the organization create its own knowledge/information?

Knowledge Management: Knowledge Storage and Retrieval
- How does the organization store what it is learning and how can staff retrieve this knowledge?

Knowledge Management: Knowledge Transfer and Use
- How does the organization transfer knowledge and use what it knows?

Information Networks
- What networks do you turn to at the:
    - Local Level?
    - Regional Level?
    - National Level?
    - Other Levels?
- What are you getting from these networks?
- What are you not getting from these networks?
- How closely do you feel connected to these networks?
- Are you linked to any networks, at any level, that are outside your specific areas of expertise?
    - If so, what are they? Why are you connected to them?

Dissemination Vehicles
- How many of your organizations believe that sharing what you know and what you've tried is part of your business?
    - For those who said yes, how do you disseminate your information?
    - For those who said no,
        - Has your organization ever discussed doing something like this?
            - If yes, what stopped or stops you from doing this?
            - If no, why do you think it hasn't come up as a possibility?

Information Needs/Frustrations/Future
- How do you feel about the information that's out there?
    - Too much? Not enough?
    - Do you know where to go to find what you need?
    - Trusted sources: How do you determine if something is credible or can be trusted?
- What are the blockages and short circuits of community information exchange?
- What contributes to the inaccessibility of information vital to you and your organization?
- Explore relationship building and civic infrastructure investments with group.
- Do you measure your learning? If so, how do you do it?
- We've been spending a lot of time talking about what your organizations do or do not do in terms of information needs, what would you like to do, if you could do it all?
    - What are the top areas, issues or processes that you think your organization should learn more about?
        - How about you as an individual?
    - What kind of information do your customers need?
        - How do you help them obtain this information?

Closing Questions

- If you were sitting where I am sitting, what questions would you have asked that I haven't?
- What do you think the answer/s would have been?
- (if time permits) When you leave here, and somebody asks you what you were doing here all this time, what will you tell them about the things we talked about?
- (if time permits) How do you think you will explain what the group as a whole thought?