

The Road to Inclusion

HOW 21ST CENTURY LEARNING ORGANIZATIONS
CAN ENGAGE COMMUNITY ONLINE



LIVING CITIES
INNOVATE • INVEST • LEAD

About Living Cities

Living Cities is an organization that is working to ensure that all people in US cities are economically secure and building wealth. Towards that vision, our strategies focus on closing the racial income and wealth gaps. Through grant-making, impact investing, and network-weaving, we support ambitious data-driven, results-oriented efforts in cities around the country. Additional information can be found at www.livingcities.org.



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Building an Equitable 21st Century Learning Organization

By Nadia Owusu

In 2012, Living Cities' CEO Ben Hecht wrote an article for the *Stanford Social Innovation Review*, titled "Leading in a Hyperconnected World," stating:

"Leadership has become distributed and collaborative. The new reality is that leaders don't lead alone. We are all part of a much broader problem-solving network, with many high-performing organizations and individuals—public and private—working on different parts of the same problem or even the same part of the same problem. The most influential members of the collaborative are increasingly harnessing new technology to share ideas, get real-time feedback, and build knowledge for the field. Leaders are no longer just steering their own ship; they are helping a network solve problems with the best and most current thinking available."

When Ben wrote that article, Living Cities was rethinking our knowledge, communications, and evaluation work to better position us to lead, collaborate, and learn in this hyperconnected world.

For over two decades, the organization—a unique collaborative of foundations and financial institutions—had worked to address poverty and inequality in American cities. Founded in 1991 with an initial focus of providing capital to and building capacity of local community development corporations, the organization had, since 2007, shifted to a multidisciplinary focus. We partnered with local governments and civic leaders to create affordable housing along transit corridors, improve education access and student achievement, and support low-income small business owners, among other efforts. In that work, we heard time and time again from our partners that working in isolation was, quite simply, not working. They wanted to learn from the efforts in other cities and around the world. They wanted real-time access to information. They wanted to build relationships within their cities and across cities. They wanted to know about what the foundations and financial institutions that made up Living Cities were funding and what they were seeing: Were there trends they had noticed from their national efforts? Did they have data that might be useful to local efforts? Were there grants they should be applying to, initiatives they should be paying attention to, opportunities to avoid reinventing the wheel?

“There is so much opportunity for people to connect around the work we are doing. Without the connections, we work in silos. I wonder what would happen if we enabled change-makers to connect and collaborate together. They can use things that are working in one place somewhere else to accelerate the work. Sharing ideas, content, and problems is crucial.”

- Kimberly Phillips, Senior Program Officer, Gates Foundation

Through the questions and requests from our local partners, it was clear to us that we were well-positioned to play an important role in social change efforts in American cities—a role that would deepen and expand the impact of our work far beyond what our grants, impact investments, and events could achieve on their own. But, to realize that impact, we would need to let go.

We would need to let go of outdated notions of what information is “appropriate” to share. Too often, social change organizations hide failures. We wait until we have all the “facts”—until we’ve conducted a multi-year evaluation, until the final report has been written and made pretty. But, doing so means that there are others out there making the same mistakes who could have benefitted from whatever data, whatever stories, whatever hunches, whatever anecdotes we had along the way.

We would need to let go of the harmful idea that we are in competition with other funders, other impact investors, other national organizations working on issues of poverty and inequality. Nonprofits can often feel pitted against each other as we compete for funding, media attention, and credit for ideas and frameworks. But, our true competitors are not other people and organizations trying to do good in the world. Our true competitors are poverty, inequality, climate change, and injustice. Taking those competitors on requires humility and collaboration. It requires openness. Perhaps another organization will learn about something we have done and improve it. We should celebrate that.

We would need to let go of centralized leadership and expertise. We decentralized our knowledge, communications, and evaluation work. We built qualitative and quantitative data collection, reflection, and communications into everything we did. It wouldn’t be sufficient to hire a third-party evaluator to write up a summation of our findings at the end of a program. Instead, we asked our staff to continuously ask our partners and ourselves how we were doing and what we were learning. How were cross-sector leaders in the cities where we worked coming together? Were they setting big audacious goals? How were they holding themselves and each other accountable? How many people were being served? What were the challenges? What specific strategies contributed to successes? How replicable were the efforts? What did we know now



that we wished we'd known when we started? We also asked our staff to write about those reflections and to share them publicly. The most effective messengers about what we were learning from our work were the people doing the work. Communications became everyone's job.

It was very important that we let go of white institutional culture norms that closed us off to important movements, community-led efforts, and people of color leaders and institutions. At the same time as we were working to become what we came to call a 21st century learning organization, we were also on a journey towards racial equity and inclusion. For most of its history, Living Cities had a race-neutral approach. That was changing. Increasingly, we found ourselves in informal but reflective and sometimes emotional conversations about the death of unarmed Black people at the hands of police, about the ways in which race and poverty intersect, about slavery and Jim Crow, and redlining and segregation.

Several staff members felt that a robust interrogation of the impact of racial inequity on cities was noticeably absent from Living Cities' work. We were asking ourselves, is it possible to achieve our mission without addressing racism with intentionality? In addition to seeking understanding of the history and legacy of racism in this country, we also had to turn the mirror on ourselves. We had to interrogate our own biases and challenge damaging power dynamics, within Living Cities and in terms of who we saw as partners, peers, and leaders. Whose work were we highlighting in our communications efforts? How could we better honor the history of Black-led organizing that ushered in some of the biggest policy and culture reforms in our nation's history? Previously, organizing had been discussed as something other people did. Organizations that were carrying the torch of organizing into the future were not typically organizations we consulted with or learned from. Whose voices were we listening to? In our evaluation and communications efforts, how did we value and pay white consulting firms differently from firms owned and led by people of color? How did we see the value of lived experience differently from the value of technical experience? Why? These were uncomfortable and necessary conversations. Wrestling with them changed the way we learn and from whom. And, fundamentally, it led us to change our mission statement from "improving the lives of low-income people in US cities" to "closing racial income and wealth gaps."

In 2019, Living Cities is an organization that is still very much on a journey. We are still wrestling with big questions about how to learn in public and how to support others in doing the same; about how to center racial equity in everything we do; and about what it will take to close racial income and wealth gaps in America.

One way we have wrestled with these questions, and invited others to wrestle with them with us, is by building a flexible online platform that we call the Economic Opportunity Roadmap. The "Roadmap," is a community engagement platform that connects people and organizations to each other—both within and across cities. Over the last year, we have worked with our funders, partners, and grantees to pilot several different ways of

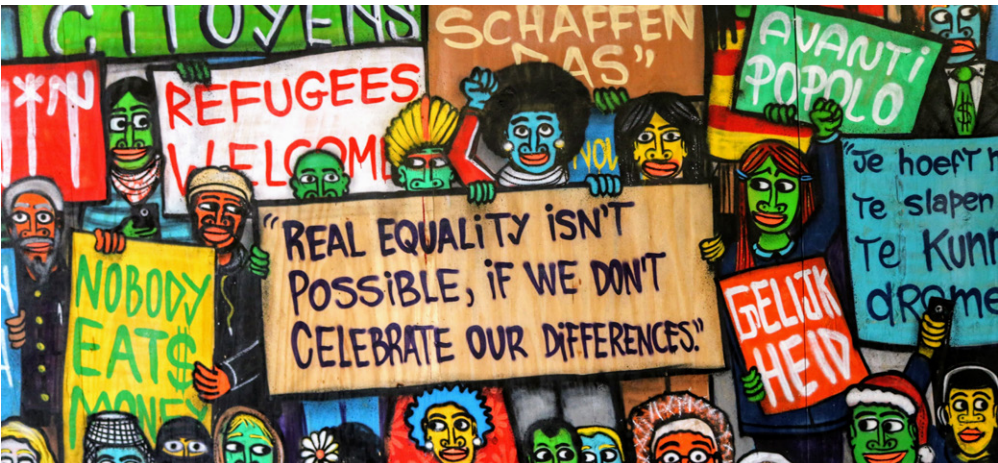
learning together in the digital space—from resource libraries, to making grant reports public, to discussion forums, to working groups. Groups on the Roadmap range from a cohort of local governments working to make government procurement systems more equitable to a group of people and organizations working to undo racism in their own operations. What unifies them are the results they want to achieve—creating more equitable communities by closing racial income and wealth gaps.

Examples of Groups on the Roadmap

RACIAL EQUITY & INCLUSION IN PRACTICE	CITY ACCELERATOR: INCLUSIVE PROCUREMENT	RACIAL EQUITY & LOCAL GOV PARTNERS
This group is a hub for those working to embed racial equity and inclusion into daily practice in organizations and agencies.	City Accelerator: Inclusive Procurement is the cohort of individuals and cities working to increase contracting opportunities for businesses owned by people of color.	A collective of people working to advance racial equity in and through city governments sharing knowledge and organizing to create greater impact together.

In this report, we are excited to share some of what we are learning from our efforts to build an Equitable 21st Century Learning Organization, and from creating and managing an online platform to that end.

Often, when I tell people my title—Associate Director of Learning and Equity—they look confused. They ask how the two portfolios I lead fit together. One is about knowledge management and communications and the other is about operationalizing racial equity and inclusion. I tell them that what the portfolios have in common is culture change. Both bodies of work require changing hearts and minds and changing processes and practices. Both bodies of work are about openness to changing who we are, how we work, and how we relate to others. This is challenging work, but if there is one thing that the last few years—from my work at Living Cities to our current political realities—have taught me, it is that to make change in the world, we have to start with ourselves.





Easel Pad
Tableau à feuilles mobiles
Block de Hojas Reposicionables

Super Sticky
Super Collant
Super Adhesivos

11.0" (27.9 cm) x 19.0" (48.3 cm)
1.2 mm (0.047 in) thick
Cant. 1 Block de 30 hojas

3M

Is your current
work intentional
about closing racial gaps?
How?

Do you have the
disaggregated data
you need to measure
that?



Executive Summary

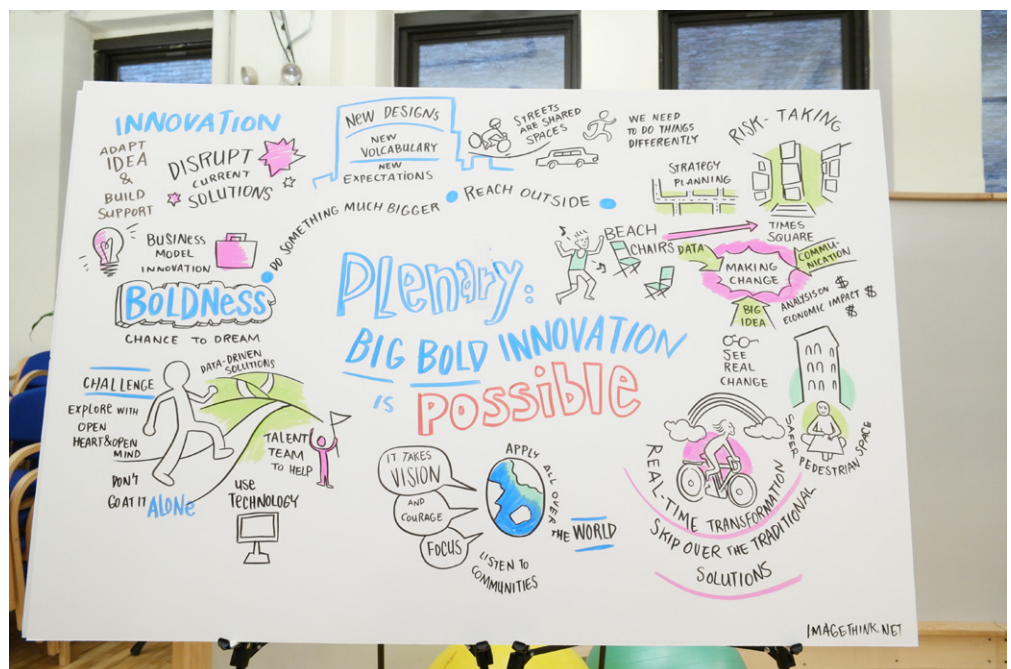
Living Cities' journey to become a 21st century learning organization that centers racial equity began by asking several questions:

- **How do we support a community of practice?** Understand the scaffolding to put around existing communities of practice that will support the development, spread, and adoption of most promising practices.
- **How do we co-create a platform for sharing?** Co-create a digital platform, building on existing technology and networks, for the effective sharing and scaling of solutions.
- **How do we build a repository of solutions?** Build a robust, dynamic repository of economic opportunity solutions that is easy to discover.
- **How do we encourage collaboration in our ecosystem?** Facilitate purposeful collaboration between Living Cities staff and stakeholders.

To answer these questions, we completed fieldscans of existing digital infrastructure, as well as developed several partnerships with other organizations to understand the needs of our community and how we could meet those needs. These partnerships included Sphaera, the Gates Foundation, Slalom, Context Partners, and Strategic Learning Partners. These partners help us test what works and what doesn't to authentically engage our communities.

We learned the following take-aways:

- For an organization to achieve social impact, it needs to work in an open, networked way. A network of partnerships can help accelerate results through the sharing of learnings and promising practices.
- The goals and results from any learning efforts need to be centered on racial equity. Ignoring racial equity as a fundamental component of learning will disregard the defining reason of inequity in our society.
- Becoming a 21st Century Learning organization does not happen overnight. This work takes time and energy and investment to build the required capacity.
- Part of the investment in becoming a 21st century learning organization is about shifting culture. Many organizations, and many individuals, are not used to working in an open, collaborative, learning environment.
- Digital engagement cannot be successful without a deep understanding of community needs; it must be done in co-creation with partners.
- Living Cities and other organizations working on digital community learning platforms are ahead of the curve. It is challenging to be supporting digital engagement in an industry that is still struggling to understand what that means.





Background

Living Cities has been exploring and defining what it means to be a 21st century learning organization since its inception in 1991. We have always placed a premium on learning over success. Ben Hecht, our CEO, likes to talk about Living Cities as an “innovation lab” where we test out new ideas to then spread what works to our member institutions and around the country. We began to put a framework on our learning agenda around 2012, when Ben wrote the “Leading in a Hyper-Connected World” article referenced in the introduction. The organization began to invest significant resources in knowledge and learning capacities, which included evaluation, communications, and knowledge management.

Living Cities is funded by its members in three-year funding cycles, and for the 2016-2019 round, we decided to refine and focus our learning efforts in the hopes of building a 21st century learning tool: a digital platform that would connect practitioners around the country to help them achieve their results in closing racial income and wealth gaps. We knew that the social sector needed significant investment in digital infrastructure—similar to the massive connectivity investments of wifi, search engines, and social media of the 2000s. We knew that while we could not undertake the massive investment required to create a digital infrastructure that serves the needs of the social sector, we could create a digital tool that meets the needs of our network, and also test some specific hypotheses in the process to build the understanding of what it takes to use digital technologies for learning and social outcomes. We decided to call this platform the “Economic Opportunity Roadmap.” Through the development of the platform, we would be able to help Living Cities achieve its results of closing racial gaps in income and wealth, while also being a model to the field about what is required to be a 21st century learning organization.

Goals of the Economic Opportunity Roadmap

When Living Cities began to build the Economic Opportunity Roadmap in 2016, we were aiming to better understand our community members — a variety of cross-sector practitioners working on issues of economic

opportunity and security — and their behaviors, both online and offline. We also wanted to examine their motivations, barriers, needs and interactions in support of a useful community experience. We hoped this greater understanding would help us support these community members in achieving their results to close income and wealth gaps. We also wanted to understand digital communities broadly: what does it take to build and maintain a community-oriented online platform for practitioners that is engrossing, motivating, inspirational, and practical?

We intentionally built the Roadmap as a series of pilots. To live our values as a 21st century learning organization, we knew that we could not come up with a project plan with rigid time-lines or completely defined goals. Instead, we developed some general questions and set some assumptions:

- **How do we support a community of practice?** Understand the scaffolding to put around existing communities of practice that will support the development, spread, and adoption of most promising practices.
- **How do we co-create a platform for sharing?** Co-create a digital platform, building on existing technology and networks, for the effective sharing and scaling of solutions.
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These questions evolved over time, but fundamentally established the approach for how we would build out the Economic Opportunity Roadmap as our “big bet” in defining what it means to be a 21st century learning organization.

“ The most surprising thing has been how realistic and grounded Living Cities has been in their expectations. They know success takes time. The Living Cities team was so willing to acknowledge the learnings from early pilots/ beta launch, take them to heart, and reevaluate the direction it could go. Originally, [Living Cities staff] thought of Roadmap being about collaboration and engagement. They reevaluated the metrics that matter. If engagement matters, it may be more about the value than the amount of engagement. ”

— Tito Llantada, Senior Design Strategist & Client Experience Lead, Context Partners



Acknowledgments and Constraints

Living Cities' journey to racial equity has been a long and winding road. When we embarked on this project, we did not have the competencies as an organization that we do today, and we did not start with racial equity in the center. We continued to build our organizational competency and culture towards racial equity throughout the project. This evolution is reflected in some of our earlier activities and assumptions, and had impacts on decisions we have made throughout this process.

Along the way as we continued on our racial equity journey, we made some changes in our process and practice. Living Cities and its consultants made decisions using a Racial Equity Impact Analysis Tool. The tool comprises several questions designed to gauge whether decisions are being made with input from relevant communities, particularly communities of color, and to prevent or mitigate inequitable, negative consequences of our decision-making.

Racial Equity Impact Analysis Tool

- Are all racial/ethnic groups who are affected by the policy/practice/decision at the table?
- How will the proposed policy/practice/decision affect each group?
- How will the proposed policy/practice/decision be perceived by each group?
- Does the policy/practice/decision worsen or ignore existing disparities?
- Based on the above responses, what revisions are needed in the policy/practice/decision under discussion?

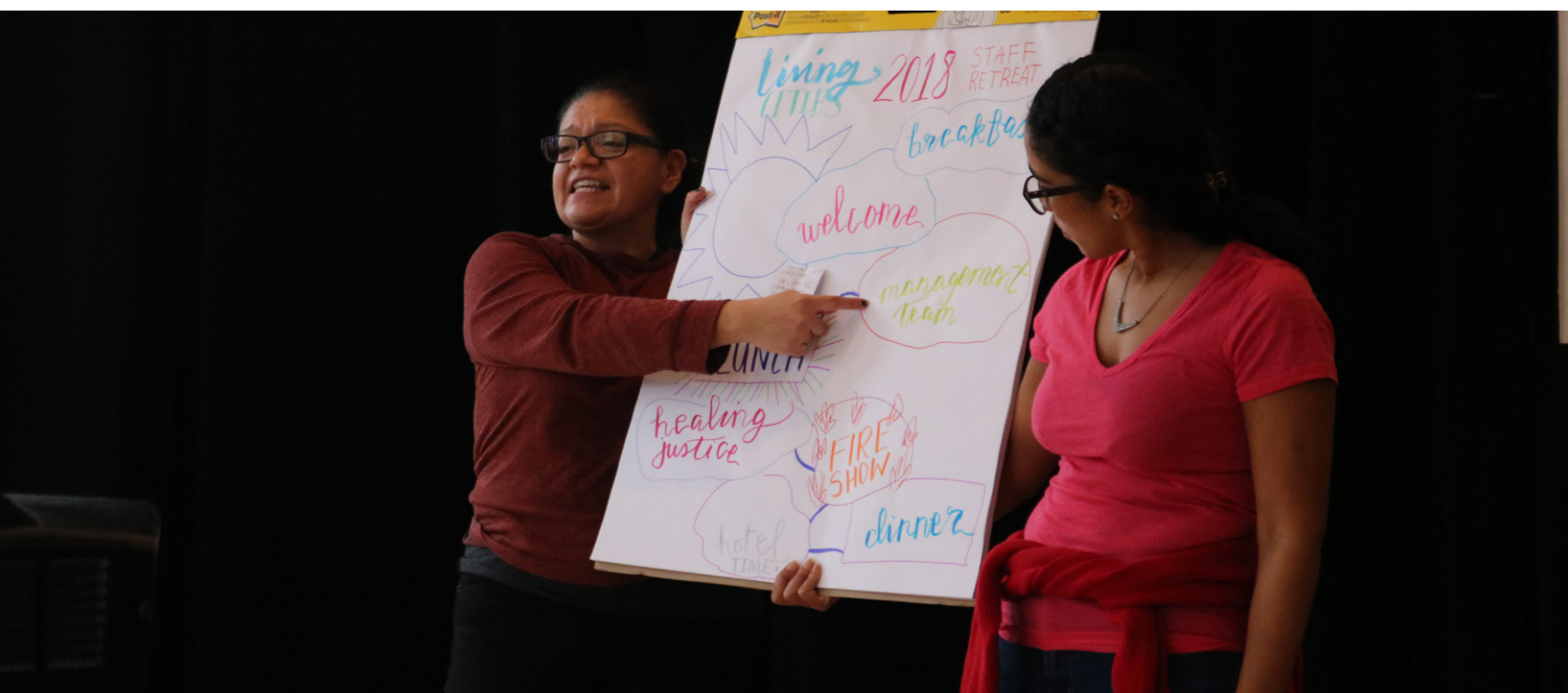
Questions adapted from the Race Matters Institute

As part of Living Cities' use of the assessment tool, we acknowledged that all research and other activities done during the pilot phase were conducted by Living Cities (or its consultants and shared with Living Cities), which may present a problematic power dynamic. While we believe our grantees and community practitioners were candid in interviews and focus groups and on the platform, we cannot guarantee

that our position as their funder did not impact their answers and participation on the platform.

It is also important to note that the Economic Opportunity Roadmap platform was introduced to community members after work-flows associated with Living Cities' programmatic initiatives were established. As a funder, we asked grantees to adopt new ways of working, which may have impacted community members' consumption of and engagement in the platform.

Lastly, Living Cities, on the Economic Opportunity Roadmap platform and off, struggles to appropriately and specifically identify who is in our community. While we fund and provide technical assistance to a cross-sector community of economic opportunity practitioners, we often fail to communicate with the communities whom our work ultimately impacts.



Preparation and Partnership

To succeed with our “big bet,” we intentionally took time to prepare ourselves and understand what others were doing. The partnerships we formed and the information we gathered helped us to answer the questions mentioned above. Each step we took or area we explored influenced the other, and helped us determine our final learnings and recommendations.



Preparation and Partnership

To succeed with our “big bet,” we intentionally took time to prepare ourselves and understand what others were doing. The partnerships we formed and the information we gathered helped us to answer the questions mentioned above. Each step we took or area we explored influenced the other, and helped us determine our final learnings and recommendations. The preparation required to become a 21st century learning organization fell into three categories:

- FIELDSCAN OF EXISTING DIGITAL PLATFORMS
- PARTNERSHIPS
- TESTING AND IMPLEMENTATION

Fieldscan of existing digital platforms

A group of Living Cities staff conducted a scan of frameworks and platforms for sharing learnings from the social change field and beyond. The three platforms that we looked at were: Engage by the Rockefeller Foundation, NYC Digital Play-book, and Social Innovator.

What we saw was:

- There are three parts to any collaboration project in service of social change: 1) the process or framework that informs the collaboration, 2) the tool or technology to facilitate collaboration, and 3) the tangible result or output of the collaboration, such as reports, lessons learned, and other content.
- There are no known examples of platforms that address all three parts.
- Frameworks or easy-to-grasp taxonomies or other organizational structures rooted in the issues practitioners are attempting to solve help users understand: 1) how solutions presented address various problems, and 2) how rigorously the solutions have been tested or defined.
- All examined platforms were custom built; no sites were found that are similar to the Economic Opportunity Roadmap, which uses out-of-the-box technologies.

Per the take-aways above, we embarked on a project to determine process, technical, and content requirements for the Economic Opportunity Roadmap and evaluate what platforms and collaboration tools can address those requirements, starting with a partnership with Sphaera, detailed in the next section.



Partnerships

Consistent with our values, we engaged with a series of partners to co-create the Economic Opportunity Roadmap, to ensure we were relying on industry best practices and learning from what others have already accomplished. Some of these partnerships were organic, and some we actively set out to build based on what we had heard about the organization's work in the field.

Sphaera Partnership

In Fall 2016, Living Cities embarked on a partnership to evaluate the effectiveness of the Sphaera platform as an inter-organizational collaboration tool that would facilitate the creation of the Economic Opportunity Roadmap.

Sphaera "provides a community for individuals to share, discover, and remix [social change] solutions that are already working," with the goal of "facilitating the work-flows central to making change happen — ideation, collaboration, aggregation, measurement, and scaling."

There were three communities of practitioners included in the Sphaera partnership: one comprising government innovators; one made up of city hall staff; and one of entrepreneurs. Each took a slightly different path towards data collection and subsequent content creation and distribution.

Through the partnership with Sphaera, we learned that to build the Economic Opportunity Roadmap, we needed to design a platform that could meet three conditions:

- Community Engagement: the ability for a user to engage with peers on specific topics
- Tech Integration: the ability for users to access the platform in a way that is user-friendly and intuitive
- Content Strategy: the ability for Living Cities or other moderators to develop and share content on the platform that helps users achieve their results

The Gates Foundation, Slalom and the Salesforce Community Platform

In Spring 2017, we started conversations with Kimberly Phillips from the Gates Foundation on their Post-Secondary Success Community Platform, which was built on Salesforce. The Community platform brings together thought leaders and other postsecondary communities of practice into one connected network. It offers a digital platform where grantees, partners, and institutions across the post-secondary landscape can connect, share, and collaborate with their peers, colleagues, and other innovative thought leaders as they transform higher education.

In conversation with Kimberly and her team, we realized that she had achieved many of the conditions we had identified through our work with Sphaera. Instead of starting from scratch, we decided to build on what Kimberly and the Gates Foundation had learned from their Post-Secondary Success Community Platform and replicate their technological

solution and adapt it for our community's needs.

We engaged Slalom, a Salesforce development consultant, on technical implementation. We started with a "lift and shift" strategy, essentially building the platform off of the Gates Foundation's model, using Salesforce, and adjusting the platform's user experience and functionality to meet certain requirements we established from previous digital community initiatives and field scans with Sphaera in 2016 and 2017. This lift and shift allowed us to have a working prototype of the Economic Opportunity Roadmap in Spring 2018.

Context Partners and Community Engagement

Once we had a platform design, we brought on Context Partners to understand and meet our community's needs. Context Partners, a community insights and strategy consultant, engaged Living Cities staff, members, grantees, and others in our network to determine how best to build out the Roadmap and to increase participation on the platform.

Context Partners used a three-step framework for engaging community members. This framework comprised a Discovery phase, a Design phase, and a Mobilize phase.

“One thing we learned is that LC has a strong foundation of a network and strong community established. Trust was already built and knowledge was already circulating in the LC community. This made the tool better positioned to success. Things were already in place.”

- Tito Llantada, Senior Design Strategist & Client Experience Lead, Context Partners

In the Discover phase, Context Partners conducted nearly two dozen interviews with individuals within Living Cities' network. In later phases, they led data-gathering webinars and facilitated information sessions at the 2018 Equity Summit and Facing Race conference. Context Partners team members also provided demonstrations at City Accelerator convenings and other in-person events held by Living Cities for grantees.

There was also a series of "pilots within a pilot," or structured tests, that evaluated select functionality and content strategies with a smaller set of Roadmap platform community members. The pilots were designed, for example, to study engagement around contributed non-grantee content; to test the efficacy of grant report requirements on the platform; and to gauge the effect of moderators in select cohort and topical groups.

Additionally, Living Cities Roadmap team members leveraged other research conducted by Context Partners for the Gates Foundation, specifically a insights brief developed from Gates' experience with its post-secondary education platform, and the organization's "Impact Community Engagement Leader Toolkit," a guide for online community moderators.

STAGES OF EVIDENCE

While Living Cities was completing the Economic Opportunity Roadmap, we decided we needed a way to classify the learnings we were sharing on the platform itself. There is value in all types of evidence, from an "a-ha" moment to a best practice that has been rigorously tested in multiple cities. But, practitioners need to be able to distinguish between emergent thinking, promising approaches, and best practices as they work to adapt and adopt.

To help our community better understand what types of learnings they would interact with on the Economic Opportunity Roadmap, we developed a "stages of evidence" model. This model should not be seen as a universal model, but rather one that is designed specifically for the platform (though others might want to adapt it or build on it). And, it is not a tool for passing judgment on the work of practitioners, but rather a tool to help make their insights, learning, and evidence as useful and usable as possible.

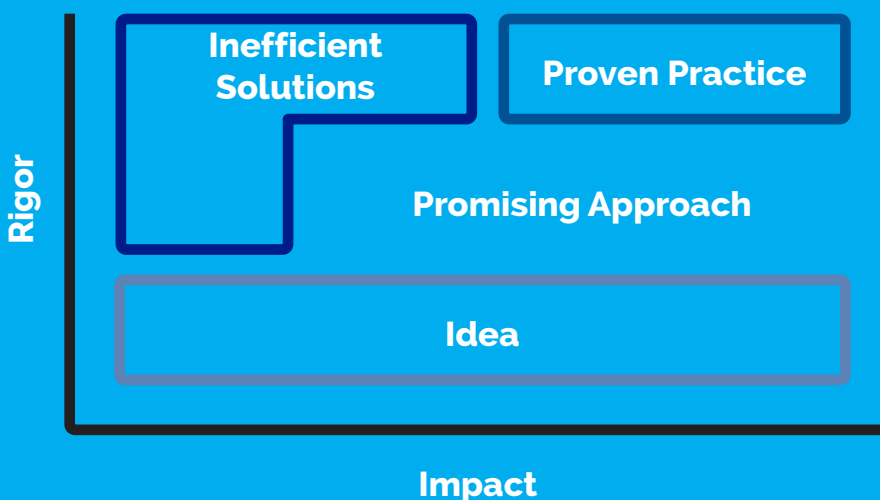
HOW TO INTERPRET THE STAGES OF EVIDENCE

The stages of evidence are different ways to consider to what extent a lesson learned or "solution" has been rigorously validated and shown to achieve impact. These stages are defined based on the level of rigorous validation a solution has received, as well as its proven ability to create impact through systems-level results.

Impact is defined as the ability for a solution to create systems-level results that improve lives and help people thrive. Impact should be thought of as the degree to which a solution increases positive results for people in a place, and not related to programmatic size or scope. Additionally, because institutionalized racism generates the largest societal inequities, any solution that aims to close racial gaps in outcomes will have greater potential for system change and thus higher impact. For example, a solution could actually be very limited in size, scope or number of players involved, but have a high ability to achieve impact (e.g., a small shift in how a city categorizes minority-owned businesses could have an extreme influence on wealth-building opportunities for people of color).

Rigor is defined as the level of a solution's proven effectiveness. A solution with a high level of "rigor" has been proven to work by external validators, such as being validated by the community or replicated across geographies. A solution that has been

Fig 1: Stages of Evidence



rigorously shown to produce results does not necessarily need to produce systems-level changes (e.g., diversity programming can be proven to help people recognize the importance of a diverse team without changing structural institutional barriers for people of color).

As seen in Fig 1, the Stages of Evidence can be visualized as a series of "steps" that a solution can "climb" as it achieves higher levels of rigor and impact. Further description of each step is as follows:

- **Idea:** A solution within the "idea" stage will always have low levels of rigor, i.e., lack of rigorous testing of the solution in different contexts. For example, a nonprofit could be testing out a new way to provide workforce development training to citizens returning from incarceration. This solution could have a high potential to achieve large-scale results, or not, which is why a solution in the "idea" stage could fall anywhere on the "impact" axis.
- **Promising Approach:** A solution within the "promising approach" stage has been somewhat validated by external parties, and an ability to achieve a certain degree of large-scale results. For example, a neighborhood revitalization program could have high levels of support from the community and initial indications that it is improving outcomes for that community. For it to move up on the Stages of Evidence, it could become replicated in other communities with the same success.
- **Proven Practice:** A solution within the "proven practice" stage has been vigorously vetted across several dimensions of rigor and shown to achieve high levels of large-scale results. These are usually solutions that are operating at a national level, moving outcomes in multiple communities, such as the Strive Network framework, or the Working Cities Challenge.
- **Inefficient Solutions:** A solution that has been rigorously tested beyond what would be required given its level of impact is considered an "inefficient solution." These are solutions that have some impact, but too much time and too many resources have been spent validating it given its ability to create system-level results for people (ie, doing a randomized controlled trial on a new after school lunch program with few indications of success). These solutions should have started with lower-costs rigor tests.



Discovery Phase

In the Discovery Phase, which lasted from winter 2017 through spring 2018, Context Partners conducted multiple interviews with a broad range of stakeholders in the Living Cities network, including staff, grantees, and other partners. The goal of this discovery was to increase understanding of the community members, their motivations, barriers, needs, and interactions.

The results from this Discovery, which was completed in tandem with the initial build out of the platform, came in the form of a series of insights and design principles:

- **Context is important.** Members of the platform expressed the need to know more about the platform itself. Community members don't always know what information is valuable to others on the platform. Living Cities has been instrumental in facilitating the right relationships and highlighting relevant resources, and that type of interaction and moderation needs to be built into the platform.
 - Design principle to incorporate the insight: Make it known. Showing what community members have to offer each other creates a culture of abundance. Guide the community in identifying what knowledge is of value to others and help to contextualize these assets to foster learning.
- **Everyone is busy.** Time is a scarce resource. The community deals with competing priorities—completing requirements to maintain its relationship with Living Cities and delivering services to low-income people in their cities. No one is interested in having one more thing to do.
 - Design principle to incorporate the insight into the platform: Value over time. Enable efficient interactions between community members that enhance their ability to effectively serve people in their cities. Our invitation for community members needed to be framed as part of the work vs an additional activity/requirement.
- **Digital is daunting.** Community members expressed a certain amount of discomfort when being presented to the platform. Many of Living Cities' community members are analog leaders and experience platform fatigue.
 - Design principle to incorporate the insight into the platform: Within reach. For the community to be effective and relevant, Living Cities must consider the realities of its members. Provide options and minimize steps for people to get what they need, when they need it.



- Trust is your greatest asset. Living Cities has established a reliable pattern of delivering on its promises and has built an infrastructure that creates pathways for success for its community. Trust reduces the steps community members need to take to make connections, to share knowledge, and to discover solutions. Moreover, trust has made Living Cities a credible and innovative investment partner.
- Design principle to incorporate the insight into the platform: Trust in us. Trust takes years to build, seconds to break and forever to repair. Every touch point and transaction with your community must continue to generate immediate value. In facilitating increased member-to-member engagement, create structures that enable community members to build trust with each other and maintain their trust in Living Cities.

Design Phase

In June 2018, Living Cities officially launched the Economic Opportunity Roadmap platform. With the launch, Living Cities used Context Partners' tools and recommendations from the Discovery Phase to design the platform in a way that would sustain existing online activity and engage prioritized members of our community. By the end of 2018, the Roadmap team had registered and fully onboarded 200 users and continued to work closely in partnership with our Salesforce developer, Slalom, to refine the platform based on user needs.

To reach this level of engagement, the team worked with community engagement consultants Context Partners to improve how we are working with our network, including a test workshop at a grantee convening and a targeted advertising campaign and engagement strategy at a national conference on racial equity. The team also conducted two webinars to support onboarding of users.

Community building blocks to drive and their corresponding Economic Opportunity Roadmap features:

Throughout this Design Phase, Context Partners continued to collect data and track learnings based on our activity with the platform. They consolidated their analysis into lessons in three areas: engaging individuals, leveraging groups, and building networks.

Individuals: Based on the findings from the Discovery Phase, the team was able to identify the following user behavioral and learning goals:

- User Behavior: Much like participants of in-person convenings, platform users need to connect with peers, access and use tools and resources, and locate expertise.
- In this case, community managers mimic convening organizers to curate and share content that responds to a specific question/need.

Groups: Although individuals' needs have proved to drive content strategy/resources sharing, the aggregation of needs and expertise within groups can spark collaboration.

- User Behavior: Groups provide individuals with a safe space to collaborate with others, multiply efforts, and enhance collective solutions.
- Just like Living Cities' cohorts are designed to provide cities with

necessary cover and access to expertise to tackle a specific issue, Economic Opportunity Roadmap groups provide a space to collaborate around similar problems and connect with outside expertise via moderation/facilitation.

Roadmap community building blocks

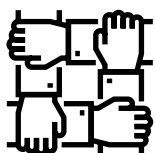
Identify the Right People

Curate the Right Content

Facilitate the Right Engagement

In identifying the right people, curating the right content, and facilitating the right engagement on the Roadmap, Living Cities determined that Groups give people who feel isolated or silo-ed within the systems in which they work on the opportunity to be a part of a community of practice and to show up for each other. As well, it knows that the Resources page has the potential to help people get unstuck by having easy access to solutions being implemented in other cities. And if members still can't find what they're looking for, they can turn to Discussions for some answers.

Roadmap community building blocks



Groups

"I'm with you."

People working to close the racial income and wealth gap often feel isolated (or the systems they are a part of silo them) from others who are doing similar work. Groups gave them an opportunity to be members of a community of practice.



Resources

"I'm stuck!"

People may be aware of solutions being developed and implemented in other cities, but they feel frustrated because they don't know where to find them, don't have easy access, or are unclear as to how they can be applied directly to their context. Resources gave them direct access.



Discussions

"I can help."

People are unaware of solutions — emergent thinking, promising approaches, and proven practices — being developed and implemented across the US, resulting in solutions not being adopted in more places faster. Discussions allowed them to discover these.

Network: Similar to how groups multiply individuals' discrete efforts, networks provide an opportunity to build, maintain, and nurture movements.

- **User behavior:** In light of Living Cities' experience supporting the creation of meaningful relationships and shared results, the platform was designed to nurture and maintain networks. Through these networks, members of the Roadmap can connect, share evidence, and most importantly, contribute to the generation of collective impact.

Mobilize Phase

Between January and May 2019, Context Partners supported Living Cities to conduct five pilots to test how the Economic Opportunity Roadmap might be used to engage different user audiences. The goal of these pilots was to engage users and to learn more about what users want. We worked with three project teams: City Accelerator 5, a cohort of city governments working to support small businesses owned by people of color; the Narrative Change Working Group, a group of representatives from philanthropy and financial institutions seeking to change commonly held narratives; and the internal Living Cities' Performance and Results team, to test the following questions:

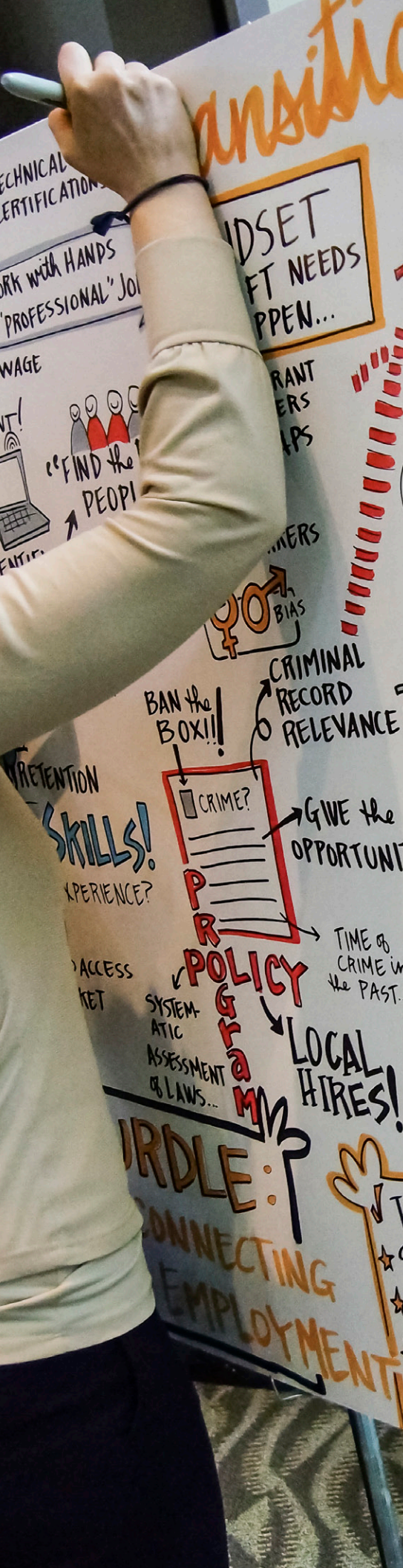


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"...I don't think the current engagement can be replaced by technology. I don't necessarily believe that we will be more informed about work that is happening locally. It's not a matter of just getting more information because that is more work for people. What's more important is knowing what is available versus how it is available."

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- Discovery phase interviewee



Pilot 1: Shared Learning and Grant Reporting in the City Accelerator 5 (CA5) Cohort Group

- Question: How might we use the Roadmap platform to engage grantees and create opportunities for shared learning through grant reporting?
- How we tested it: Using the CA5 cohort, we reviewed and refined half-year grant reporting questions, identified which to put on the Roadmap, and designed an engagement to facilitate conversation and share learning.
- What we learned: With facilitation from a moderator, the Roadmap is an effective tool for requesting and sharing grant reporting, and a conducive environment for grantees to ask questions and learn from one another's experiences.

Pilot 2: Narrative Change Working Group Roadmap Engagement

- Question: How might we engage senior, external partners to use the Roadmap as a bridge between working group meetings?
- How we will test it: We will introduce the Roadmap platform as the place for follow-up to produce a blog post based on the conversations at the Narrative Change working group meeting.
- What we learned: This pilot is still underway, no preliminary learnings as of May 6. The REI working group meeting is now planned for July.

Pilot 3: Performance and Results and Continuous Improvement

- Question: How might we get more cross-team learning for Living Cities staff out of the existing learning and continuous improvement process?
- How we tested it: We reviewed continuous improvement documents, observed several learning sessions, and interviewed three Living Cities team members to better understand what they want to learn about other teams and how they'd like to learn about them.
- What we learned: Cross-team learning is happening organically and can be improved, but a technical solution, and the Economic Opportunity Roadmap in particular, is not the right solution at this time. There are better opportunities to be seized in adapting how Living Cities team members think about meaning-making, and when and where they talk about what they're learning.

Pilot 4: Moderators Championing Connections in the Roadmap

- Question: How might we support Roadmap moderators to engage new users and re-engage inactive users?
- How we tested it: We conducted discovery interviews with Living Cities moderators to understand their current behaviors in the platform, their pain points, and to identify opportunities for increasing user engagement and connections in the Roadmap.
- What we learned: While there are many opportunities for moderators to create user connections, moderators are busy. They need practical tips and tools for engagement tactics to try and when to use them. As a next step, we will focus our time on creating and testing a playbook for engaging new users and re-engaging existing, inactive users.

Pilot 5: Content Contributions from Non-grantees

- Question: How might we support the collaboration needs of Federal

Reserve Bank of Boston's Working Cities cohorts as they transition to sustainability?

- How we tested it: We joined a meeting of the Federal Reserve of Boston's Working Cities cohort leads and facilitated a discussion of current and desired collaboration among cohorts.
- What we learned: For a collaboration platform like the Roadmap to offer meaningful value to these cohorts, there needs to be a very clear use case or purpose for that collaboration. There is not a general demand for a collaboration platform.

“ People want to help themselves. Just provide them with resources they genuinely need. ”

-Discovery phase interviewee



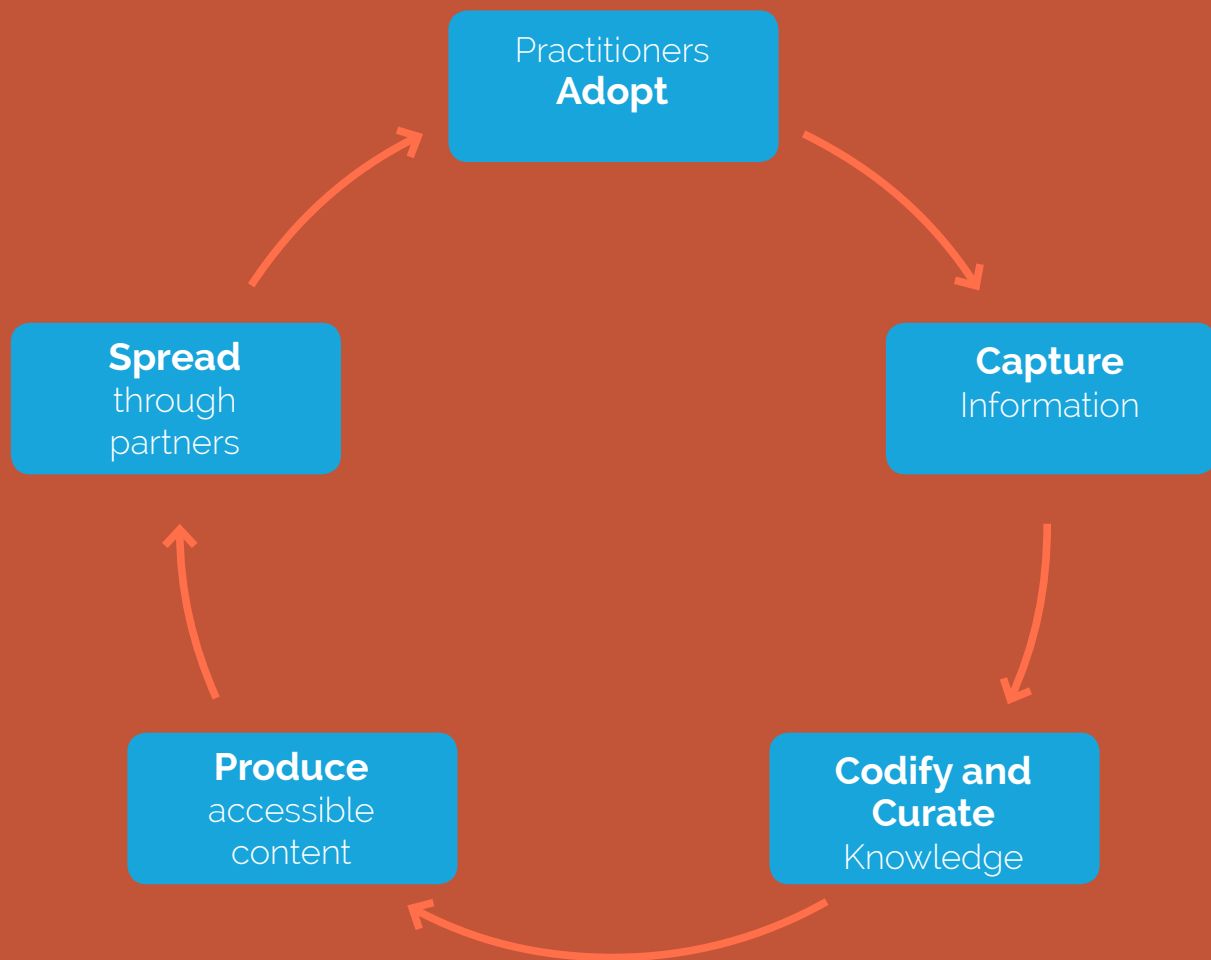
RACIAL EQUITY HERE

Racial Equity Here came out of a Living Cities task force, convened in response to Freddie Gray's death, which brought together cross-sector leaders from our member institutions to create a new vehicle for action against the still-present effects of structural racism in U.S. cities. Through the Racial Equity Here (REH) cohort, Living Cities worked with the Government Alliance on Race and Equity (GARE), a project of the Center for Social Inclusion and the Haas Institute for a Fair and Inclusive Society, to provide technical support and coaching to a cohort of five cities – Albuquerque, Austin, Grand Rapids, Louisville, and Philadelphia – as they analyzed how their operations impact people of color and devise actionable solutions.

REH was an early adopter of the Economic Opportunity Roadmap platform, with most of the cohort members becoming users in the first few months after launch. A specific, private group for the cohort was created, allowing REH members to share lessons about their work in real time. Prior to the Roadmap platform,

Living Cities relied on in-person convenings for cohort participants to connect with each other. The platform supported these in-person events and allowed for continued conversation between gatherings.

Living Cities staff also used the platform group to re-think grant reporting requirements. Cohort members would submit traditional grant reports directly to Living Cities, and the lessons contained in them would not necessarily be disseminated to all cohort members. If they were, it would be through a future convening or scheduled call. Using the Roadmap platform as a tool, cohort members were able to share their grant reports directly with others in the network, which helped them learn from each other in real time. Because of this functionality, Living Cities staff actually developed different reporting requirements, focusing more on sharing lessons learned and responding to others' work, rather than traditional compliance-focused elements.



LIVING CITIES INTERNAL LEARNING PROCESSES

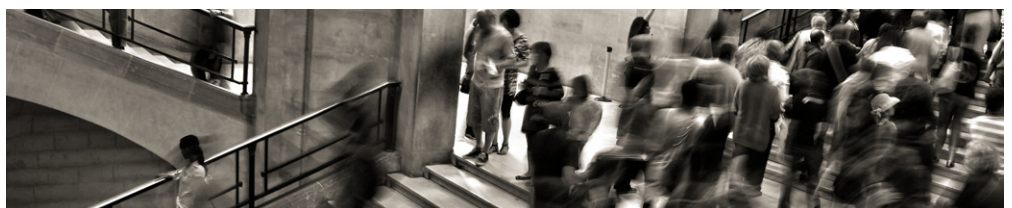
As we built out the platform, Living Cities was also working on our internal learning and content development processes. We wanted to make sure that our internal processes could contribute to populate content on the Economic Opportunity Roadmap platform. What we learned was that building an evidence base for a digital engagement platform requires a multi-step feedback process: Capture (collecting information), Codification (synthesizing information), Production (translating information into actionable content), Spread (sharing that content), Adoption (audiences using content to change behavior).

Major Takeaways and Insights on Digital Engagement for a 21st Century Learning Organization

Through the months and years working with our community through digital tools and engagements, we have come up against many challenges and discovered many lessons. Beyond the specific results outlined above, we have developed several insights that may be relevant to others seeking to become a 21st century learning organization. We will continue to explore these insights as we continue our learning and racial equity work, and hope you will join us on our journey.

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- For an organization to achieve social impact, it needs to work in an open, networked way. A network of partnerships can help accelerate results through the sharing of learnings and promising practices. Partners should understand the collective commitment to learning, and develop goals for sharing resources and promising practices to ensure time on learning is spent efficiently. Through this network, we build relationships based on shared values towards shared results.
- The goals and results from any learning efforts need to be centered on racial equity. Ignoring racial equity as a fundamental component of learning will disregard the defining reason of inequity in our society. To be able to learn in service of achieving results, a racial equity lens must be applied at all levels of the process.
 - When we focus on racial equity, we are focusing on the ways in which race compounds and intersects with other issues that people of color face. Race intersects with other marginalized identities, which includes gender, sexual orientation, and disability, and we want to be sure to reflect on all of these different intersections in our work. One of the things that we feel is important for our future work in building digital communities is that we must have accessibility as a priority.
- Becoming a 21st century learning organization does not happen overnight. This work takes time and energy and investment to build the required capacity. Living Cities had a team of seven working on the Economic Opportunity Roadmap, and the whole organization was expected to have baseline learning capacities in executing their project tasks.
- Part of the investment in becoming a 21st century learning organization is about shifting culture. Many organizations, and many individuals, are not used to working in an open, collaborative, learning environment. Making this shift will take commitment from leadership and lots of support from all levels of the organization. It is not a linear process, and will have many fits and starts.
- Digital engagement cannot be successful without a deep understanding of community needs; it must be done in co-creation with partners. We spent a significant amount of time and resources understanding what our community wanted in a digital platform, rather than determining what we thought would be best to offer. This co-creation did not stop after the platform was launched, either. We continually are checking in with users to understand what is working, what isn't, and why, to continuously improve our product.
- Living Cities and other organizations working on digital community learning platforms are ahead of the curve, and sometimes it is challenging to support digital engagement in an industry that is still struggling to understand what that means. There needs to be an industry-wide consensus to invest in the infrastructure required to increase connection between social sector organizations. It can't be done piecemeal, but has to be comprehensive and meet the needs of all partners. Things that can (and are being explored) are things like the digitization of nonprofits 990's, developing unified grant reporting across funders, and establishing benchmarks for learning activities in the sector.



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