

Peer Networking and Community Change: Improving Foundation Practice

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Key Points

- This article brings together the Annie E. Casey Foundation's 15 years of experience with peer networking—examining through two research studies the process of peer networking and its impact, both with community-based and funder groups.
- Peer networking helps people with common interests to exchange information, disseminate good practices, and build a leadership structure for work they do together, such as a community change initiative.
- Casey's research identified 10 good practices for effective peer networking, as well as 10 challenges that can affect its success; a four-level model was created to provide context for these findings.
- The research indicates that peer networking can have significant impact for communities and in meeting philanthropic goals, but it is costly and must be carefully structured if it is to be successful.
- Casey is working to synthesize its peer networking practices into a more strategic framework, and other foundations might use some of its lessons learned to enhance their own practices in this area.

Introduction

Thomas Edison said, "To have a great idea, have a lot of them." Enriching the flow of ideas for problem-solving, decision-making, and learning is one of the two main purposes of peer networking. The other is to build a structure for real-time involvement of people and organizations in the enterprise of change, whether it is foundation

executives seeking to improve their practice or residents taking ownership of a community change initiative.

For more than 15 years, the Annie E. Casey Foundation has been creating and participating in peer networking activities focused primarily on promoting community change. While far from uniform in operation, Casey's peer networking activities all reflect the common-sense assumption that creating space and providing support for people to meet regularly around shared concerns can improve community change outcomes.

Recently, the foundation has started to synthesize its experiences with peer networking and to examine the impact of these activities. Two studies supporting these explorations are discussed here (Backer, 2008, 2009). We also discuss how these learnings could be shared with other foundations – particularly those that support comprehensive community change through multisite place-based initiatives (Kubisch, Auspos, Brown, & Dewar, 2010), and those that are embedded in their local communities and participating directly in the work of change (Karlstrom, Brown, Chaskin, & Richman, 2009). While this article draws specifically on the experiences of the Annie E. Casey Foundation, these approaches have been used by other foundation and government funders, as well as by various intermediary and community organizations. Two notable examples are The California Endowment's Building Healthy Communities initiative (Backer & Kern, 2010), and the

U.S. Department of Education's Promise Neighborhoods, both of which have peer networking components.

The Annie E. Casey Foundation was established in 1948 by Jim Casey, one of the founders of UPS, and his siblings, who named the foundation in honor of their mother. Today, with assets of more than \$2.3 billion, Casey is among the largest private foundations in the United States. The foundation's primary mission is to foster public policies, human-service reforms, and community supports that more effectively meet the needs of vulnerable children and families.

Casey's peer networking activities evolved from its recognition of the need to mobilize diverse human resources in promoting community change. The foundation realized that it could not do this work alone, and that ongoing interaction with partners and broader involvement in the work of community change were critical to the success of its funding and leadership activities. These principles held true for a number of Casey's initiatives, as discussed here.

Initially, the foundation's peer networking activities were somewhat siloed in separate initiatives established by Casey. The foundation invested in separate studies of some of these peer networking processes, and also sought feedback directly from networking participants. The two studies reported here represent the next step in this learning process: to bring results and insights from individual peer networking activities into an integrated whole.

The studies were commissioned in 2006 and 2008. Together, they tested three assumptions: (1) that peer networking works, (2) that an ad hoc "let a thousand flowers bloom" approach to developing peer networking activities can yield good practices and identify key challenges, and (3) that these individual learnings can be synthesized into a more strategic approach to peer networking that would offer valuable benefits for participants and for Casey. As results from the two studies show, peer networking already has evolved from an episodic and informal set of gatherings to a

prevalent, if not yet standard, practice at Casey. The next step is to bring these synthesized learnings into Casey's overall philanthropic strategy, which also can have value for other foundations that are involved in or contemplating similar peer networking enterprises.

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The "thousand flowers" approach involved 19 peer networking activities over a 15-year period. For 13 of these, Casey initiated and funded the effort and maintained a strong influence on the peer networking activities, even though leadership was turned over to the participants. We refer to these activities as "Casey-coordinated peer networking" activities. In the six other cases, Casey was a participant in, and sometimes partial funder of, a peer networking activity involving a group of funders. We refer to these as "externally coordinated peer networking" activities.

Defining Peer Networking

Peer networking is a problem-solving, decision-making, and learning approach built on interaction, both structured and informal, among two or more people defined as "equals" by virtue of their similar goals and interests, job roles, or place in a community. Peers come together to exchange information, disseminate good practices, and build

a leadership structure for work they do together, such as a community change initiative (Rhodes, Stokes & Hampton, 2004; Center for the Study of Social Policy, 2003; Center for the Study of Social Policy & EZ/EC Foundation Consortium, 2001).

Peer networking thus goes far beyond a series of meetings or informal contacts. A living system is created to support the networking process, often bearing some resemblance to a community of practice.

What sets peer networking apart from an advisory committee, task force, or other traditional vehicle for promoting community involvement and decision-making? As the term “peer” itself denotes, there is a heavy emphasis on building in equality for the participants for the interaction process. Also, “peer” in this context denotes “role-alike” – people who play similar roles in their organizations or in the community, or at least have a common interest that brings them to the table.

Peer networking takes two major forms. The first type involves establishing a peer network that brings together people with common interests. A peer network can be somewhat informal and “virtual,” with participants interacting primarily by phone or email. It can also be highly structured: planning and holding in-person meetings, fostering active collaboration among group members, and engaging in other activities that may involve pooling of resources. Eighteen of the 19 activities discussed here are peer networks. On the continuum of informality-formality, all of Casey’s peer networks are relatively formal, which increases their potential for impact but also their cost and complexity, as we will discuss later.

The second type of peer networking involves a peer match between two individuals or groups

so that one can learn about activities of the other (often the process is reciprocal). Some peer matches includes a site visit by one or more leaders of an organization or community to the location of a successful change effort, so that participants can gain insights about replication or problem-solving techniques from direct observation. The research reported in this article studied only one peer matching effort, but it involved a large, well-developed system whose activities have many important implications for effective peer networking. This effort has had considerable validation of its impact.

The concepts described above are not new, and peer networking also aligns with several related concepts. The Center for the Study of Social Policy (2003), along with the EZ/EC Foundation Consortium (2001), regard peer networks and peer matches as two of five forms of what they broadly refer to as peer assistance. The other forms are professional development programs, learning circles, and peer-developed learning products. In the world of philanthropy, some form of peer networking often is part of a set of strategies for stakeholder interactions that help guide foundations in shaping their mission and implementing their programs (Backer, Smith, & Barbell, 2005). Bringing together peers in a networking process is also a subcategory in the broader realm of social networking, which has been studied extensively in the social and behavioral sciences (Rogers, 2003; Bailey, 2005).

The Importance of Peer Networking to Casey

In implementing the various peer networking approaches, Casey has emphasized (1) inclusive decision-making intended to foster ownership of a community-change initiative, (2) an intensive problem-solving approach in the development of leaders who can implement change, and (3) promotion of Casey’s own efforts to be a learning organization, as defined by Senge (2006). Peer networking thus goes far beyond a series of meetings or informal contacts. A living system is created to support the networking process, often bearing some resemblance to a community of practice (Wenger, McDermott, & Snyder, 2002). The system is intended to build an ongoing

learning component into meetings or other peer networking activities. This process is likely to require a substantial investment of time and money to prepare learning materials or presentations, document what's learned, and provide direction for establishing learning objectives on which both Casey and community participants can agree.

The use of peer networking is consistent with Casey's underlying philosophy and theory of change related to its work in communities. The foundation has a deep commitment to learning, as evidenced, for example, by its long-standing practices of documenting its work and studying both positive and negative outcomes of its major initiatives. This commitment is also reflected in the establishment several years ago of a robust, technology-based Knowledge Management unit within the foundation to collect and share knowledge among staff as well as with external audiences.

Casey's commitment in recent years also has focused on comprehensive community change initiatives, defined by Kubisch et al., (2010) as place-based efforts that concentrate resources on particular neighborhoods or cities. Peer networking can contribute greatly to such initiatives by bringing together stakeholders both within and across sites to provide input, build ownership, and promote more effective implementation and evaluation.

In his seminal book on diffusion of innovations, Rogers (2003) notes that networking can have significant impact on the overall processes of innovation and change, and he cites a wealth of supporting research on this subject. For instance, Rogers emphasizes the usefulness of "weak ties" in social networks – connections between people who do not live in the same environment and don't already know each other. These weak ties are powerful because they bring into contact people who are not from the same background, often giving them opportunities to learn about things outside their usual realms. Many of Casey's peer networking activities draw on this diversity, both within communities and across sites, thus enriching the contribution of these activities to community change.

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Two Studies of Peer Networking

A total of 19 peer networking activities were examined in the two studies reported here (see Figure 1). As noted, they included 13 activities funded and coordinated directly by Casey. Participants in these activities have included Casey staff, staff of other foundations, and a variety of community leaders. Six other peer networking activities were examined, in which the participants were staff of U.S. foundations (including but not limited to Casey staff).

To examine these activities, both studies combined interviews with document review. Interviewees included Casey staff, other philanthropic and community participants in the peer networking activities, and thought leaders in philanthropy.

The first study, conducted from 2006 to 2008, looked at the process by which peer networking activities were implemented and sustained (Backer, 2008). The second study, conducted in 2008-2009, focused on the impact of peer networking on individual participants, their

FIGURE 1 Peer Networking Activities Studied

Casey-Coordinated Peer Networking Activities
<i>Child Welfare Training Directors Group.</i> This peer network (now concluded) focused on the role of staff training and development in systems reform for child welfare agencies across the country and also on best-practice approaches to staff training and development in these systems.
<i>Children and Family Fellows Alumni Network.</i> The alumni network brings together people who have held Casey Child and Family Fellowships.
<i>Community Foundation Exchange.</i> This network of community foundations (now concluded) held multiple meetings over two years, examining effective practices – especially around advancing outcomes for vulnerable children and families.
<i>Family Strengthening Awards.</i> This network is run as a joint venture with a dozen national nonprofits. Each uses their contacts to identify potential recipients of an award for promoting community-based approaches to family strengthening. Network meetings both supervise the awards and offer chances for members to share and solve problems on more general issues.
<i>Language Access Network.</i> This network is focused on learning what would help limited English-proficient children and families have better access to high-quality services, and on the specific challenge of reducing the number of children who serve as translators for their parents.
<i>Leadership in Action Program.</i> This is a network composed of representatives from Making Connections community sites (and sites of other Casey programs). It is oriented toward helping communities and their leaders implement results-based leadership-development programming.
<i>Making Connections Local Coordinators Network.</i> The local coordinators in this network are Casey consultants who work with the Making Connections sites on the ground.
<i>Making Connections Resident Leadership Network.</i> This network enhances the capacity of local residents at the Making Connections sites (plus Casey's Atlanta civic site) to participate in this community change effort, with problem-solving and leadership-development opportunities.
<i>Making Connections Social Network.</i> This network assists the Making Connections initiative in promoting the healthy growth of social networks at its community sites.
<i>National Partners Network.</i> This network consists of the chief executive officers of 11 national nonprofit organizations. They meet to focus on promoting wider use of family strengthening approaches.
<i>TARC Peer Matching.</i> This peer matching system offers structured opportunities for teams of people in two or more communities working on similar issues to exchange experiences and practical knowledge. Their interaction is focused on challenges that have been identified in advance.
<i>United Way Training Program.</i> This network is focused on an executive education program developed to get family-strengthening approaches more broadly understood and adopted among United Ways across the country.
<i>Urban Child Welfare Leaders Group.</i> This peer network pulls together commissioners or directors of child welfare systems in large urban areas to explore best practices and challenges in their respective environments.
Externally Coordinated Peer Networking Activities
<i>Casey/CSSP Alliance for Race Equity in Child Welfare.</i> This peer network is focused on race equity in child welfare systems, and its members are the Center for the Study of Social Policy, four Casey philanthropies, and several other groups.
<i>Lead Program Executives Group.</i> Composed of foundation executive vice presidents (or equivalent job titles), including those from some of the largest foundations in the U.S., this network explores unique leadership and operational issues that these "chief program officers" encounter in their jobs.
<i>Leadership Development Funder Affinity Network.</i> This network brings together leaders of about 30 foundations that have a funding interest in leadership development.
<i>Long-Term Funders Exchange.</i> This network's members are funders of long-term community change initiatives. They meet to discuss the special challenges of creating, operating, and evaluating such initiatives.
<i>National Rural Funders Collaborative.</i> This network consists of CEOs and program officers from 12 national and regional foundations with funding interests in rural communities.
<i>PRI Makers Network.</i> This network brings together funders interested in making program-related investments so they can share best practices and coordinate their activities.

organizations, and the communities in which they operate (Backer, 2009).

An Example of Casey Peer Networking: The Urban Child Welfare Leaders Group

One of the 19 peer networking activities that the two studies explored is the Urban Child Welfare Leaders Group. We profile its history and outcomes below to provide an example of how these efforts are organized and operated.

The Urban Child Welfare Leaders Group holds about four meetings a year, inviting commissioners or directors (and their deputies) of the largest public child welfare agencies in the United States to come together to talk about the unique issues they face. The 20 or so participants discuss frankly the many challenges of running a complex child welfare system in an urban setting, and experts make presentations on topics such as older youth aging out of care or court reform. The group works to lift up specific problems members want help in solving, and also to “move the field” toward systems change – including, but not limited to, the kind of change the Annie E. Casey Foundation is promoting for vulnerable kids and families. While Casey covers hotel and meeting expenses, group members pay their own way and set their own agenda, with support from Casey staff. The group is operated by the Annie E. Casey Foundation in collaboration with its sister philanthropy, Casey Family Programs.

Although the Urban Child Welfare Leaders Group itself is not large, the organizations whose leaders are in this peer network serve more than 50 percent of all “kids in care” in the United States. The group therefore has the potential to make a significant impact on how child welfare services are organized and delivered and can offer leadership for many communities not represented at these meetings.

Sixteen examples of impact were identified in an independent evaluation study of the Urban Child Welfare Leaders Group (Backer, 2010). Two of the impact examples are:

- One child welfare agency director returned from a group meeting armed with information

on how the Las Vegas child welfare agency has “turbocharged” its family search efforts in the first hours that a child enters protective custody. The agency director followed up to learn more about this program from the Las Vegas leadership, gathering information about how it is staffed and which software program it uses to search for relatives. That information was critical to implementing a similar program in this new jurisdiction.

- An agency director wanted his child welfare agency to engage birth parents more deeply in the service process, and learned through a group meeting about another member’s program for doing so. Following the group meeting, staff members from the agency that had implemented the birth-parent program were invited to visit the agency interested in adopting this approach to help the adopting agency’s personnel brainstorm about how to get the program off the ground in this new setting.

Study 1: The Process of Peer Networking

The first study focused on developing an increased understanding of how each of the 19 Casey peer networking activities actually works. Study results were synthesized into two sets of lessons learned: one concerning good practices of peer networking that interviewees identified as responsible for the success of these activities (sometimes interviewees also offered objective data to back up their subjective appraisals); and one concerning challenges to success that arose in these 19 activities. These lessons are listed in Figure 2.

The process study found that Casey peer networking activities are successful because they:

1. *Provide a safe, trustful place for participants to interact on topics important to them.* The establishment of trust plays a central role in all types of peer networking activities. Participants need to feel that their confidences will be respected and that they can be candid about their experiences and feelings in a non-judgmental, supportive environment. For example, the Leadership Development Funders Affinity Group has funders-only meetings, not affiliated with the Council on Foundations

FIGURE 2 Peer Networking at the Annie E. Casey Foundation: Good Practices and Challenges

10 good practices of peer networking
Provide a safe, trustful place for participants to interact on topics important to them.
Encourage personal as well as professional interactions among participants.
Customize the peer networking structure to meet specific participant needs.
Promote opportunities for participants and their organizations to collaborate.
Encourage participant feedback about the strengths and challenges of peer networking.
Build the activity's initial success before broadening its range of participants.
Offer resources for participants to translate ideas into action.
Create subgroups within the peer networking activity to focus on particular topics of interest.
Shape the activity by analyzing the successes of other peer networking activities.
Level the playing field by sharing basic information about the focal area of peer networking.
10 challenges of peer networking
Peer networking is costly in time and money.
Participants in peer networking may find it difficult to take action on good ideas they've developed.
The goals of peer networking may be difficult to identify and to share.
Peer networking may be difficult to integrate with other activities of its sponsor.
It may be challenging to balance equality with expertise in selecting peer networking participants.
Organizational complexity and culture of a peer networking sponsor may limit chances for success.
It may be challenging to develop a good exit strategy for a peer networking activity.
Replicating peer networking activities may be difficult.
Participant turnover may limit the success of peer networking.
Individual and group psychological factors may limit the success of peer networking.

or other philanthropic associations, where “deep and candid conversations” happen in a “safe place for reflective practice,” as interviewees put it. Similar meetings convened by the Urban Child Welfare Leaders Group were discussed earlier.

2. *Encourage personal as well as professional interactions among participants.* In the Casey peer networks, there was latitude for people to talk about some personal matters if they wished, which fostered interactions that in some instances were very powerful. For instance, when a member of one network became ill, two other members flew to the member’s location at their own expense to visit the member in the hospital and provide psychological support.
3. *Customize the peer networking structure to meet specific participant needs.* In many of the

peer networking activities studied, a process was defined early on for how to periodically reassess the networking structure so that it could be refined to reflect the changing needs and priorities of a networking group, a particular participant in it, or the home organization. The Community Foundation Exchange made a major investment in bringing together community foundations to focus on building their effectiveness in their communities, and in sharing ideas and strategies with like-minded peers. As this effort developed, the exchange invested major resources into restructuring its networking activities to reach specific goals identified by exchange members.

4. *Promote opportunities for participants and their organizations to collaborate.* Making time available at networking meetings to explore collaborations among members

and later report on them can help to create a “culture of collaboration” in which peer networking participants automatically think about how their goals could be better met by working with other members. Thus, members of the Leadership Development Funders Affinity Group are encouraged, both through the meetings of this peer network and through contacts outside the more formal interactions, to approach other members about possible collaborations.

5. *Encourage participant feedback about the strengths and challenges of peer networking.* Opportunities need to be structured for gathering feedback, and once such information is gathered, an absolute commitment must be made to share results openly with all relevant parties. Evaluation data can be used both to justify the benefits and improve the quality of the peer networking activity. The Children and Family Fellows Alumni Network has developed several informal feedback channels that help to supplement what was learned from a more formal outside evaluation study conducted by the OMG Center (discussed elsewhere in this article). Stories written by the Fellows about the impact of their participation in this peer network have been published in a series of newsletters and used as one of many tools to document lessons learned from this group. The Fellows also have opportunities in the alumni network meetings to talk about what they’re learning and how to improve peer networking.
6. *Build the activity’s initial success before broadening its range of participants.* Most peer networking activities encourage participation from a broad range of players in the community. But if a push for broader inclusiveness comes too early in the life of a network, it actually can jeopardize chances for success because of the extra energy it takes to manage a diverse group of participants. It is much easier to integrate a broader range of participants once the networking activity is already up and running smoothly. The Making Connections Resident Leadership Network waited
7. *Offer resources for participants to translate ideas into action.* One of the Casey peer networks (the Children and Family Fellowships Alumni Network) provided small grants to network members to support special projects. Proposals were reviewed by the entire network membership and approved on the basis of the design and external need for the innovation being supported. These projects had a direct impact in benefiting participants’ communities, and the availability of this funding also provided an additional incentive to help keep network members actively engaged.
8. *Create subgroups within the peer networking activity to focus on particular topics of interest.* Small subgroups of participants with highly focused common interests were mentioned frequently as desirable elements of peer networking. Often, these small groups emerged naturally out of discussions occurring in larger network meetings, and their focus was on a particular problem or task. For instance, the Making Connections Local Coordinators Network divides up into small groups at its regular meetings for more in-depth discussion on particular topics, such as work force prepa-

to invite mayors and United Way directors to peer networking meetings until the network was well-established and actually had accomplished some things in the community. Being able to point to these achievements made it easier to get major institutions like United Way involved without losing individual resident voices.

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ration. Sometimes these subgroup meetings are conducted informally over a meal.

9. *Shape the activity by analyzing the successes of other peer networking activities.* Peer networking participants can benefit from looking together at selected research and experience on peer networking from other sources. The reported successes and challenges of these activities should be explored in such an exchange, and it helps if some of the experiences the participants study took place in communities and under circumstances similar to their own. The Social Network has looked at a number of intermediaries that have been successful at networking, such as the Oakland Family Independence Institute. Social Network members have conducted site visits with several intermediaries, providing input for development of a framework for social-network building for Making Connections and helping to identify essential elements that help tie networking activities to an overall community change mission.

ing of social investments as a general concept and of program-related investments (PRIs) in particular. Casey commissioned a consultant to develop a set of publications for use by network members, termed “PRI 101” by one interviewee.

These good practices can be considered any time a new peer networking activity is being created, or when members are reviewing current operations and suggesting possible improvements. Using the roster of 10 good practices presented here as a simple checklist can help to stimulate useful discussion.

One more general observation: Success for the peer networking activities studied in this research reflected, to varying degrees, a dynamic balance between structure and informality – defined by Peters and Waterman as “simultaneous loose-tight properties” (1982). Peer networking activities were in most cases structured enough to promote continuity and follow-through, but informal enough to encourage candid conversation and adaptability to whatever participants thought should be discussed or acted upon.

The research also identified a number of challenges faced by those operating Casey’s 19 peer networking activities:

1. *Peer networking is costly in terms of both time and money.* These activities can become quite expensive, particularly if they involve travel to meetings, staff time coordination, bringing in expert speakers or consultants, etc. Peer networking organizers need to gather basic information about how much such activities cost, both in human resources and financial terms, so that questions about impact of the investment can be addressed intelligently. Transportation costs alone can be substantial in bringing people in nationwide networks together; other costs that need to be factored in include those for planning and coordinating meetings or field-based peer matches, creating reports that document outcomes for follow-up, and creating communication channels.

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10. *Level the playing field by sharing basic information about the focal area of peer networking.* Particularly when some of the peer networking participants are people whose expertise or job roles are not the subject area of the activity, it is important to share a working knowledge of the topic with all participants to “level the playing field” for interaction and problem-solving. Such sharing ideally is part of the orientation participants receive when they first join a peer network. For instance, during the formation of the PRI Makers Network, it became clear that Casey staff members needed a better understand-

2. *Participants in peer networking may find it difficult to take action on good ideas they've developed.* Peer networking is often seen as a somewhat marginal activity to those not directly involved in it. When participants go back to their home organizations, they may encounter resistance to implementing the ideas that emerged in a networking meeting. Some of that resistance may stem from the fact that resources are needed to do the implementing, and in the current hard economic times that reality may pose a legitimate roadblock for many nonprofits and communities.
3. *The goals of peer networking may be difficult to identify and share with others.* A related challenge is that those who are not present at peer networking sessions often cannot as readily grasp the overall purposes of peer networking. Several of those interviewed said they developed an “elevator speech” to concisely share with others in their home organization and community the goals of peer networking – and offer examples of its impact. Communicating clearly about the purpose and benefits is vital to securing the internal buy-in needed to keep peer networking activities going. For example, the Children and Family Fellows Network, in the words of one interviewee, has been better at “serving the interests of members directly, and less able to connect with the broader world” (e.g., for purposes of public policy advocacy).
4. *Peer networking may be difficult to integrate with other activities of its sponsor.* People in the organization sponsoring the peer networking may also need the “elevator speech” and other information to figure out how networking activities fit into the larger mission of the organization. This is important both to achieve synergy with other organizational activities and to underscore why scarce time and other resources should be devoted to peer networking.
5. *It may be challenging to balance diversity with access to knowledge and resources in selecting peer networking participants.* Peer

networking activities aimed at community change – especially in diverse, complex communities – need a wide range of stakeholders, including residents in most cases. Sometimes particular attributes (such as specialized expertise or high-level access to resources and power structures) are needed but are only available from people who come disproportionately from certain parts of a community. Choices may need to be made by network leadership about who comes to the table, striking a balance between diversity and people with these particular attributes.

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6. *Organizational complexity and culture of a peer networking sponsor may limit chances for success.* Certain peer networking activities may not always align well with the management style of the foundation sponsoring them. Finding the right fit is particularly challenging when there is a group of sponsors rather than just one. It is important to anticipate such challenges and build in mechanisms to address them if and when they arise. The organizational silos of a relatively large, bureaucratically complicated organization like Casey, which has several hundred employees, can limit the impact of that open process. For example, Casey staff working on one peer network often did not know much about other networks operated by their colleagues, even though there may have been significant learning potential in looking across networks for operating principles and problem-solving.

7. *It may be challenging to develop a good exit strategy for a peer networking activity.* Whether for a specific subgroup effort or the peer networking activity as a whole, it is important to recognize that these activities are not always intended to be permanent operations. If plans for wind-down or transition to some other status are built in from the beginning, the transition is likely to be much smoother. For example, the Child Welfare Training Directors Group planned carefully for its closure in 2006, after a successful run. Its final meeting included exercises designed not only to “say goodbye,” but to wrap up the network’s operation in ways that encouraged follow-up where appropriate.

Power differentials among supposed “equal” members can never be entirely eliminated and often need to be addressed if the peer network is to be successful.

- 8. *Replicating peer networking activities may be difficult.* Even when their success is well-documented in terms of both process and outcome, peer networking activities may be hard to transfer from one community site or topical area to another. Peer networking activities are often developed in ways that are quite idiosyncratic to the subject or environment for which they were created. It may be easier to replicate principles for effective networking, such as those highlighted in this study, than specific activities, since these principles are less dependent on context.
- 9. *Participant turnover may limit the success of peer networking.* Inevitably, there will be turnover in the membership of any peer networking activity. Having a regular procedure for handling turnover is essential, so that new members can be recruited, oriented, and transitioned effectively into the activity. Participants felt that such orientations should

be included in the routine operation of the network in order to make sure they are scheduled a timely way.

10. *Individual and group psychological factors may limit the success of peer networking.* Peer networking activities are made up of people, and people are prone to have miscommunications, conflicts, and personal agendas that can impede the success of the networking operation as a whole. For instance, power differentials among supposed “equal” members can never be entirely eliminated and often need to be addressed if the peer network is to be successful. The key to dealing with these problems, as in other challenges, is to put a structure in place in advance to make relatively low-key, efficient conflict resolution possible. This structure can be part of developing an operational framework for peer networking – ideally, the group can make a commitment in writing to a set of agreed-upon principles for how it will operate over time.

The challenges outlined above offer cautions for funders and developers of peer networking activities to consider in planning these efforts. As in the case of the 10 good practices highlighted earlier, a simple checklist of these 10 challenges could be used in a brainstorming exercise in which the group asks, “Are we at risk for any of these challenges?” and, “If we are at risk, what can we do to prepare a healthy and effective response?”

Study 2: The Impact of Peer Networking

The second study looked at the impact of Casey’s 19 peer networking activities at three levels: (1) overall impact, emerging from descriptive documents and interviews; (2) specific examples of impact, provided by interviewees involved in peer networking activities; and (3) results emerging from more structured evaluation research for five of the peer networking activities.

Level 1: Overall Impact

Interviews and document analysis showed generally that people involved in these 19 peer networking activities find them to be of value in promoting knowledge and skill development for

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participants, and in facilitating positive change for the organizations and communities the participants represent. The study found three more specific types of impact for the entire group of peer networking activities:

- *Casey's peer networking activities are sustainable.* They have run regularly for as long as 17 years (the three longest-running Casey-coordinated activities started in 1992, 1997, and 1999; only two of the 13 activities have concluded). The externally coordinated peer networks in which Casey is a participant and co-sponsor go back as far as 2001.
- *Sustainability for Casey-coordinated activities can go beyond Casey's involvement.* For example, the Community Foundation Exchange members gained so much from this peer network that they decided to pick up the cost to continue it after Casey concluded its support for this time-limited initiative.
- *Casey peer networks provide resources to their members.* For instance, as described previously, the Children and Family Fellows Alumni Network has a small grants program for local projects that members want to undertake. More than \$1 million has been awarded under this program.

Level 2: Specific Examples of Impact

Specific examples of impact were provided for 13 of the 19 Casey peer networking activities. These examples were divided into four types: new program development or implementation, improvement of an existing program, information-sharing about specific activities or more general strategies, and policy change at the local or regional levels.

All of these topics related to community change, broadly defined to include neighborhoods, cities, counties, and states as well as particular groups of funders, professionals, or community leaders. People interviewed for the remaining six activities did not identify specific examples, although they each asserted that the activity had an impact on its identified environment or topical area.

In addition to the three examples of impact already cited for the Urban Child Welfare Leaders

Group, the following two examples demonstrate impact through new program development or implementation:

Community Foundation Exchange members gained so much from this peer network that they decided to pick up the cost to continue it after Casey concluded its support for this time-limited initiative.

- *Community Foundations Exchange:* The Milwaukee Community Foundation acted as a catalyst to bring together a community strategy for family economic success for the city of Milwaukee.
- *Leadership in Action Program (LAP):* LAP was started in Maryland in 2002, at a time when only 49 percent of kindergartners entering school were assessed as being fully ready to learn. As of April 2009, that percentage had risen to 73 percent as a result of other policy and program changes as well as the impact of LAP.

An example of impact through program improvement is *TARC Peer Matching's* match between public agencies in San Antonio, Texas, and Fairfax County, Virginia. It enabled participants to bring back a model for performance-based budgeting that has dramatically changed the way the San Antonio agency works with providers of social services, both for initial contracting and ongoing project management. This peer match was so successful that an agency in Los Angeles subsequently visited San Antonio in order to learn from providers there about what they had implemented based on their match with the Fairfax County program.

An example of peer networking impact through information sharing is *Language Action Network (LAN)*. More than 1,700 documents were placed on the Migration Policy Institute's Language

Portal website developed by LAN, including a set of master contracts to use as examples for local contracting and information on how to deal with unions and on how to recruit bilingual staffs cost-effectively. More than 115,000 page views were generated in the first year.

Finally, two examples of *impact through policy change* emerged from the study, one at the state level and one within a peer networking member organization:

- *Casey/CSSP Alliance for Race Equity in Child Welfare*: Peer networking activities led to the passage of legislation on racial disproportionality in the state of Washington, as a direct result of peer networking that the alliance facilitated between Michigan and Texas.
- *Lead Program Executives (LPE) Group*: A conflict-of-interest policy was requested by one group member foundation's CEO, so the LPE member on that foundation's staff sent an email to the group asking for input about how it handled similar requests and some concrete examples. The resulting input led to a written policy reflecting a consensus of good practice in the field. The group's input helped to get this policy developed in a much shorter time period than would have been possible otherwise. This strategy has been repeated many times in the group's history, on topics ranging from evaluation to due diligence.

Level 3: Evaluation Research

Only five of the 19 peer networking activities have had a formally defined evaluation effort (the Children and Family Fellows Alumni Network, Language Access Network, Leadership in Action Program, TARC Peer Matching, and Urban Child Welfare Leaders Group). All five are Casey-coordinated peer networking activities. Four of these five also maintain a database on their activities. Among externally coordinated activities, the PRI Makers Network also has a database that isn't currently used for evaluation, but could readily be adapted for this purpose.

The Children and Family Fellows Alumni Network has been the subject of several evaluation

efforts. *Turning Curves, Achieving Results: A Report of the Annie E. Casey Foundation's Children and Family Fellowship* (2007) refined and expanded on "eyeball assessments" that had been done to examine what happens to Fellows after they participate in this experience. "The results presented here clearly show that Children and Family Fellows are helping agencies, nonprofits, and other organizations achieve dramatic, measurable results that have a direct impact on the quality of life for vulnerable children and families," the report concludes (p. 12).

The 2007 report provides demographic data on the Fellows along with in-depth profiles detailing the work of five Fellows after having participated in the Fellowship program. For instance, Craig Levine, a 2000 Fellow now working for the New Jersey Institute for Social Justice, reported that he collaborated with officials in Essex County, N.J., to implement Casey's Juvenile Detention Alternatives Initiative (JDAI), which he had learned about through his participation in the Fellows Alumni Network. JDAI's implementation in Essex County helped reduce the number of youth detained from 244 in 2003 to 115 in 2006. As in many of these examples of impact, other forces, such as the efforts of Levine's collaborators in Essex County, also were at work and contributed to these outcomes, but the effect of peer networking is still significant.

As previously described, a mini-grant program supporting the Fellows has been used to launch important programs in their organizations. Fellows have leveraged their Casey funding to expand these efforts. In recent years, the program has been set up so that each grant proposal has to include a set of performance measures, and grantees must address these measures in their reports. This approach makes it possible to go back and assess performance, which has proved to be quite positive in most cases. As mentioned, more than \$1 million in grant funding has been distributed thus far.

The alumni network has helped to inspire Fellows to apply for these mini-grants. Fellows who receive funding also can obtain consulting input

from other Fellows on how to carry out their projects. The Children and Family Fellows program has been the subject of a considerable amount of process documentation, including an external evaluation (Gutierrez et al., 2005) that provided valuable information about the way the program and its alumni network function. Another follow-up research study on the process by which Fellows interact may be undertaken in 2011.

According to those interviewed, there are presently no plans to analyze impact data on the operation of the fellows' alumni network or the fellowship as a whole, although everyone interviewed agrees this would be desirable. Data on outcomes for the program's early years are limited and mostly anecdotal; moreover, they are not available in an electronic format, so they would be difficult to analyze. More recent data on post-fellowship job roles of the Fellows and results from the mini-grants program are more amenable to analysis.

As a second example, TARC Peer Matching, which brings together teams from two or more community sites to exchange experiences and practical knowledge, also has been the subject of external evaluation. An assessment by Community Development Associates in 2002 found that 100 percent of respondents were satisfied with their participation in the peer match.

TARC also maintains an extensive database of peer match reports documenting some 80 peer matches conducted between 2000 and 2009. Reports are updated out to 18 months after the match to document outcomes for both families and organizations participating in the matching activity. Many positive outcomes are described in these reports.

Recently, a group of TARC peer match participants came together for a Casey consultative session to discuss what they have learned and how to reshape the peer matching role. A writer is now synthesizing what was learned from this session, and that document will be shared with everyone involved in the peer matching process to help improve practice.

The TARC customer satisfaction data previously mentioned, along with database entries about self-reported outcomes as part of the case studies, could be analyzed to provide more evidence about impact. The case studies focus mostly on process, although there are some qualitative data about impact, including input from sites about how the peer match directly affected their practice.

“Trust, time, and truth” are the firm ground on which all good peer networking ultimately rests.

Synthesis of Results From the 2 Studies: Aligning Peer Networking and Community Change

To synthesize the results from these two studies of Casey's peer networking activities, a four-level grid was constructed (see Figure 3). Each level of the grid is discussed further below.

At the bedrock level of the grid are three enduring qualities of successful peer networks, reaffirmed time and time again in both research and community experience and mentioned many times by the interviewees for these two studies. “Trust, time, and truth” are the firm ground on which all good peer networking ultimately rests. These qualities permeate both the philosophy and actual operations of effective peer networking.

- *Trust:* Networking activities are successful if they create a trusting environment for the participants in which they feel safe expressing what they think and having an honest discussion with other networking participants.
- *Time:* Networking activities are successful if they allow sufficient time for the activities to develop and mature.
- *Truth:* Networking activities are successful if they are transparent in their operation and if they gather and offer ready access to accurate data about their operations and impact.

FIGURE 3 Peer Networking and Community Change Grid

Community Change			Ultimate Outcome
Learning	Capacity building		Immediate outcomes
Infrastructure			
Good Practices	Challenges		Strategies
Communication	Space		Foundation
Resources	Problem-solving/ Learning		
Trust	Time	Truth	Bedrock

The foundation level above this bedrock includes the four core components of peer networking. The first is a communication system that includes in-person and electronic aspects, ranging from telephone conference calls to email or Twitter messages. Peer networking uses these kinds of tools to create a space (physical, electronic, or both) in which network members can interact. Operation of the networking activities requires a range of information as well as human and financial resources. Successful peer networking includes the architecture for a problem-solving/learning process that engages the network members, both for the community as a whole and for the organizations they represent.

Achieving success in peer networking hinges on using good practices that others have found helpful and on responding to challenges that arise in such activities. The strategies described above, identified in research on Casey’s peer networking activities, provide a beginning point for defining what those leading a peer networking activity should do, what they shouldn’t do, and what to be cautious about.

The grid also identifies immediate outcomes of peer networking: (1) learning (individually, by peer network members and others involved in the community change effort, and organizationally, by the peer networking coordinating group and other organizations involved in the network); (2) capacity building (for the peer network and for the organizations involved in the work of community change); and (3) development of an effective infrastructure for operating the network and maintaining it over time.

Finally, all three levels just described are focused on an ultimate outcome – making community change happen. The specific ultimate outcome typically is identified by the funder (most often Casey for the activities described here) and needs to be tightly circumscribed if the change effort is to be both successful and measurable. Goals too broad tend to dissipate energies, and some community-level goals are so lofty that they cannot be readily assessed, so it isn’t possible to learn whether impact was achieved.

Improving Peer Networking Practice in the Field of Philanthropy

Peer networking can help to shape the development and impact of community-change initiatives over a wide range of participants and topical areas. These activities provide a vehicle for involving key target audiences, not just in providing consultative input, which is important in itself, but also in doing the work of change. The communications platform and psychological supports they offer are particularly important for place-based initiatives that aim to create change at a more comprehensive level to deal with complex problems like poverty or improvement of child welfare services. The work of change is hard, so all participants, including the foundations funding such work, need all the support they can get to increase the chances for success.

Peer networking also can be part of a larger agenda for foundation learning related to community-change initiatives and for general self-improvement efforts in philanthropy (e.g., Brown, Colombo & Hughes, 2009; Giloth & Gerwitz, 2009). The findings presented here from the

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Annie E. Casey Foundation's work can be used as a starting point for a broader discussion in philanthropy, particularly among foundations undertaking place-based work through either multi-site initiatives or an "embedded funders" approach in which foundations concentrate on working in particular geographic areas at the ground level (Karlstrom et al., 2009).

For example, The California Endowment recently launched a 14-site place-based initiative aimed at improving children's health outcomes in a set of disinvested communities across the state. Peer networking will be one of the strategies used to facilitate the operation of these sites. Casey and the endowment already maintain regular contact about their place-based community change activities, and further dialogue about peer networking could be part of their ongoing discussions. The endowment recently commissioned a study of peer networking practices in place-based initiatives (Backer & Kern, 2010), which is now being used to shape the peer networking activities of the 14 sites in the Building Healthy Communities initiative. In the government sector, the U.S. Department of Education has built a peer networking component into its Promise Neighborhoods place-based initiative, which has funded its first set of community projects modeled after the Harlem Children's Zone (Backer & Kern, 2010).

Other foundations and government agencies also are implementing place-based strategies for addressing various community problems, and peer networking can be a key component in these initiatives as well. The work reported here is a good point of departure for a broader discussion of how peer networking can increase the likelihood of effective community change, and of how more funders, including foundations and government agencies, could include this strategy in planning, implementing, and evaluating community-change initiatives.

One particularly valuable way to help promote greater user of the peer networking approaches described here could be to convene a consultative session bringing together foundations and government funders, which historically have not communicated much on this subject. Such a ses-

sion could be coordinated by Casey, perhaps with the Center for the Study of Social Policy (CSSP) and the Human Interaction Research Institute (HIRI) as co-sponsors.

One particularly valuable way to help promote greater use of the peer networking approaches described here could be to convene a consultative session bringing together foundations and government funders, which historically have not communicated much on this subject.

The session could review and analyze the studies described here as well as related work CSSP and HIRI are doing, building on a previous session CSSP convened on peer networking in 2001 (Center for the Study of Social Policy & EZ/EC Foundation Consortium, 2001). Participants could include Casey staff, other foundation and government leaders interested in peer networking and community change, and researchers and thought leaders in the field of philanthropy.

Questions for consideration at this consultative session could include: 1) How can methods for evaluation of peer networking activities be improved? 2) How can social media and new technology platforms be used as part of cost-effective peer networking? 3) What are the most appropriate roles for foundations to assume in community-based peer networking? and 4) How can peer networking be linked with other mechanisms for promoting change in communities, such as community organizing and creation of intermediary organizations?

Other possibilities for discussing and disseminating what Casey has learned about peer networking include a webinar (aligned with webinars

on related topics recently conducted by the foundation) and national philanthropy conference presentations. Like the consultative session, these dissemination vehicles could present basics derived from the two studies of the 19 Casey peer networking activities, answering such basic questions as “How do you set up a peer network and how do you maintain its viability over time?”

It should be noted that the studies reported here have limitations. They are based on one foundation’s experiences, process characteristics were determined largely through interviews rather than by direct observation, and impact was evaluated largely through interviews and other sources of relatively less structured data. Even so, the work described here reflects a body of knowledge that can be harnessed to bolster and improve the peer networking practices of other foundations. The dissemination mechanisms briefly described in this report offer an opportunity for the Annie E. Casey Foundation to share what it has learned from more than 15 years of peer networking activity with other foundations and to continue its own learning curve on how these peer-based efforts can contribute to successful community change.

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