

**WHOLE THINKING PROGRAM
ALUMNI INTERVIEW-BASED ASSESSMENT
SYNTHESIS REPORT**

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INTRODUCTION

Prompted by a desire and need for feedback from the 2007 Whole Thinking program alumni about a range of topics, I undertook an interview-based assessment of the Center for Whole Community's "Whole Thinking" (workshops and retreats) program. Specifically, the feedback CWC sought from alumni was three-fold and included: description of alumni experiences of the Whole Thinking program and the impact they feel it has had on their work; a better understanding of the distinct uniqueness, as well as the similarities and differences, of the Whole Thinking workshops and the Whole Thinking retreats from the perspective of alumni; and information to inform alumni follow up opportunities. This report provides a synthesis and analysis of findings from telephone interviews with alumni, as well as a range of options to consider for future activities.

Methodology

The analysis for this report relies strictly on telephone interviews conducted between November 2007 and January 2008 with individuals who have attended Whole Thinking workshops, retreats, and both.

Protocols

The protocols used for the interviews explored interviewees' expectations of the experience; the experience itself; how the interviewee feels they are using the experience in their work and everyday life; and, finally, suggestions for ways CWC can best support them as alumni of the Whole Thinking program. The protocol for interviewees who attended both workshops and retreats included a section on how (if at all) the two programs compare to one another and how (if at all) they complemented and built upon one another. All three protocols are included in Appendix A of this report.

Interviewees

A list of alumni contacted and interviewed is included in Appendix B of this report. Below is detailed information on those contacted and interviewed in each interview category:

Workshop/retreat

Of the 19 names provided, 16 were contacted for interviews. Of the 3 not contacted, 2 had been interviewed in the past and 1 is with an organization from which 3 people (1 of whom did the workshop, two of whom did the workshop/retreat) were interviewed for this evaluation. Of the 16 contacted, 14 interviews were completed, one person denied the request for an interview, and one person cancelled on account of family illness. Of the 14 interviewed, 8 were from land trusts, 2 were from large land conservation organizations, 3 were from an open space protection collaboratives, and one was from a foundation. The 2 people with whom interviews were not conducted were both from land trusts. Of the 3 not contacted for interviews, 2 were from land trusts and 1 was from a youth conservation organization.

Retreat

Of the 22 names provided, 22 were contacted for interviews. Of the 22 contacted, 13 interviews were completed, 8 did not respond to emails and follow-up emails, and 1 email bounced back. Of the 13 interviewed, 3 were from academic institutions, 3 were from land trusts, 3 were from environmental advocacy organizations, 2 were from a bay conservation organization, one was from a large conservation organization, and one was from a national parks organization. Of the 9 who did not respond, 1 was from an academic institution, 1 was with a planning organization, 1 was with an environmental advocacy organization, and 3 were with large land conservation organizations.

Workshop

Of the 14 names provided, 14 were contacted for interviews. Of the 14 contacted, 9 interviews were completed, 1 did not respond to emails and follow-up emails, 1 responded too late, and 3 declined to be interviewed. Of the 9 interviewed, 6 were from land trusts, 1 was from a green space collaborative, and one was from an open space public agency. Of the 5 who did not respond, 4 were from land trusts and 1 was from a coastal conservation organization.

The following table provides some basic demographic information on each of the interviewees:

	Workshop (9)	Retreat (13)	Workshop/Retreat (14)
Gender			
Women	7	6	6
Men	2	7	8
Race			
People of color	0	5	2
White	9	8	12
Region			
East coast	5 (all New England)	7	6
West coast	3 (all California)	1	5 (all California)
West/Midwest	1	2	2
South	0	3	1

It is important to note that this report is not a comprehensive evaluation of the value or impact of Whole Thinking program. To be a true evaluation, the research portion of this project would have needed to go beyond alumni interviews to include interviewee perspectives on each questions prior to attending the retreats and workshops, review of written workshop and retreat evaluations, interviews with staff, facilitators, resource people and others associated with the Whole Thinking program, interviews with colleagues of alumni (from the same organizations) who have not attended Whole Thinking programs, research into this particular sector of the workshop and retreat market, as well as a number of other things. Instead, this analysis relies strictly on the data from the thirty six interviews conducted.

Report structure

The first section of this report provides a summary of what expectations workshop and retreat alumni brought to the programs they attended; how they described the programs once they had gone through them; and what their experiences were of the workshops and retreats. In particular, the summary presents factors that interviewees reported contributing and detracting to their experiences.

The second section considers, from the perspective of the alumni, the similarities and differences of the retreats, how (if at all) the experiences build upon one another, and which alumni would choose if they had to.

The third section considers how the workshop and retreat have impacted alumni in their work and their lives, what kinds of challenges individuals face in trying to integrate their learning, particularly in their work and organizations, and the kind of support they find they need to move forward with the kind of work they want to do.

The fourth and final section of the report presents a range of suggested roles that CWC might consider playing to support alumni in maintaining momentum and capitalizing on the energy with which they leave the Whole Thinking program. Section four also explores in detail some of these suggestions and ideas, as well as others, to provide fodder for future conversations and deliberations.

SECTION I

Expectations of the workshop

Half of the workshop/retreat interviewees attended the retreat before the workshop and felt largely prepared for it by the experience they'd had at the retreat. Most of the seven were, in fact, involved in some capacity in the planning for the workshops. All who attended the workshop first or the workshop-only also felt prepared by alumni-colleagues and friends, exposure to CWC writing, involvement in the planning and/or simply the spirit of an open mind. In terms of the actual information provided, few recalled it or had anything to say about it.

Although most said they felt comfortable with the "preparation" they received and all reported a good experience of their workshop, a number commented that the workshop wasn't what they expected. Specifically, five people thought the workshop would focus more on Whole Measures and the use of it in specific contexts. Once through the workshop, however, most of these same people saw the need and logic with "leading up to where Whole Measures actually made sense."

"If someone had told me we would spend two of the two and a half days leading up to Measures, I would have thought that wouldn't be a good use of your time. Given that, I'm not sure there's a good way to prep people for this type of a workshop. It wasn't what I expected and I was pleasantly surprised."

"I think we were thinking it would be more about Measures of Health than it turned out to be. It turned out great because we really needed to have all of the discussion that led us ultimately to the Measures of Health instrument, which was introduced at the very end."

Two comments articulated disappointment at not going deeper with Whole Measures and that it felt like add on at the end, a "sales job." According to these interviewees, if Whole Measures was going to be introduced at the end it should have been modified more for the specific situation of the group(s) participating in the workshop.

Expectations of the retreat

Most of the retreat interviewees found the information provided in preparation for the retreat adequate, although a number noted that they sensed CWC intentionally did not provide much information. For most, this "lack" of information was fine because they went in with an open mind and few expectations. Five felt that it added to the "intentional mystery" of the experience, "...they left a lot mysterious, but I kind of got that was the intent. It prepared me to be open to whatever we were going to experience."

Of the interviewees who attended both the workshop and the retreat, half did the workshop first and half did the retreat first. The half that did the workshop first felt very prepared for the retreat through their experience at the workshop. Those who received

their first exposure through the retreat (workshop/retreat attenders who did the retreat first and those who did the retreat only) all either talked with alumni-colleagues or friends or were simply comfortable going into the experience with what one person described as the “broad but not definitive” agenda CWC provided. Most understood from alumni-colleagues and friends or the website and materials that the retreat was a “come as you are” experience, thus they were, for the most part, “prepared to not prepare.”

Only one out of twenty-six retreat interviewees said they would have liked to have received more information beforehand. The person specified that he would have liked information about the site, such as a walking map, as well as a basic primer on dialogue (although he said that this latter would have also been fine to receive at the end or as a reminder after the retreat). This was countered, however, by a majority sentiment that more information might have created expectations and limited the extent to which participants were open to the experience. In fact, one interviewee admitted feeling that all the information she received from various sources about the retreat before attending created preconceptions on her part about the retreat experience, “... I’ve heard about Knoll Farm from so many people – I went in with more preconceived notions than other people. I thought I knew more about it than I did.”

Describing the workshop

Four of the nine workshop-only alumni found the workshop hard to describe or felt “you had to be there” to understand it. Workshop/retreat goers, on the other hand, were more definitive and clear with their descriptions – only one said it was hard to describe. In addition to in-depth exposure to the concepts from the retreat, the involvement of retreat alumni in the workshop planning probably also provided ample practice in describing the Whole Thinking workshop in relatively concrete terms.

Workshop-only interviewees, in particular, tended to describe the workshop as catalytic and pivotal in the way they considered and thought about the foundation of their work and themselves in their work:

“... [it] was kind of a consciousness raising experience of getting reconnected to values and the importance of dialogue with other people around values, reinforcing importance of relationships.”

“It’s a well structured workshop that helps us reexamine the foundation of our conservation work.”

“An opportunity to re-think what we’re doing in land conservation. Reassess what fundamentally we’re trying to achieve.”

“Within our project group it completely changed the conversation we were having ... It opened us up to grappling with the issues. It changed the way we talk about them.”

Both workshop-only and workshop/retreat interviewees described the impact of the workshop at multiple levels: sectoral (land conservation), organizational, individual, and the articulation between and among those different levels. At the sector level, the workshop was described as a place for gathering conservation leaders to “go beyond where we usually go” and as “broadening the perspective of what we’re trying to do in the land movement in terms of becoming more inclusive of other people.”

At the organizational level, almost all described the workshop as an opportunity to create a common language and common ground internally. For land conservation organizations this has meant that space has opened up for conversations and dialogues that expand beyond deals and transactions into things like organizational responsibilities in the community and about the need to frame and drive their work with common values. For many, the workshop helped surface things they, as organizations, knew but hadn’t clearly named, for others it introduced a whole new way of thinking about work they were already doing, “It’s a new way of thinking, looking at things. It’s a new concept, we’ve always known but it’s brought it into focus.”

At the personal level, workshop alumni referred to the personal power that the workshop helped them uncover along with the communication skills the workshop helped to build. People found this combination powerful, particularly in the context of their own organizations, where they now not only feel more courage to speak about the things they personally value, but have language to do so.

Describing the retreat

Several people said they tailor their discourse about the retreat for the audience they are addressing. For example, for audiences open to the methods and concepts the retreat introduced, they use language like “reconnecting to personal values,” “connectivity of people and community,” and “bridging relationship across divides.” For more skeptical audiences, language like “leadership development” and “goals and priorities” are more the norm.

When asked to describe what the retreat meant for them, interviewees relied on adjectives like life-changing, transformative, and catalytic, and nouns like reflection, examination, and exploration. More detailed descriptions that capture some of what a number of interviewees shared include:

“It’s an experience where you take your own knowledge, feelings, and values and examine them and put them together. It makes you look at interdependence in a new light, in terms of people, place, habitat, nature, water, land. From the conceptual to the resources and people.

“... my own thinking changed as the week went on. In a very kind of non-linear, not very content filled way.”

“...my interest is in linking the idea of land to social justice, but I haven’t seen it framed that way. This linking has to take place, by one movement on behalf of the other. Basically, social justice and land have to be the same movement.”

“...time and space to be with yourself and your aspirations fully and minimally clouded by your normal daily life ... to be with yourself and your aspirations and other conservation leaders who are going through the experience.”

“Truly grounding a person in what you do and why you do. Truly was a leadership building ...”

“...it made me think about things like my role in the community in which I live, my role and obligations professionally.”

“It’s an opportunity to really do some self inquiry about values and what is important to you personally, and then taking steps for how those personal values you connect or reconnect with are expressed (or not) in your life – home, community, or where you work.”

Workshop/retreat alumni seemed, unsurprisingly, able to describe the retreat more concretely than retreat-only alumni since increased exposure seems to hone the ability to describe and talk about the Whole Thinking programs. Twice as many of the retreat-only than workshop/retreat alumni framed the initial part of their responses to the question “How do you describe the retreat to others” with qualifiers such as, “It’s hard to describe ...” “It depends ...” or “You have to experience it yourself ...”

Workshop experience

Participants

Across the board, interviewees said they enjoyed, felt moved by, and were enlightened by the information and the way it was presented in the workshop. People repeatedly mentioned that the opportunity to exchange ideas and information with fellow participants was one of the workshop’s main highlights, but even those who found it more a presentation of information than an exchange of ideas found the workshop enriching. Those who went through the workshop with members of their own organization found it a unique opportunity to exchange with colleagues in a different context; those who did it with people from a mix of organizations found it an opportunity to learn from other perspectives and experiences. Two people also explicitly mentioned the importance of “resource people” who contributed to the conversations informed by and from a perspective of deep experience.

Two interviewees who were not members of the “dominant” organizations at the workshop mentioned the importance of either doing the workshop with equal representation from each organization or with just one organization so as to maximize organizational learning and to minimize focusing the process on just one group.

Length

With respect to the length of the workshop, about half felt the workshop needed to be longer and cover more ground and half felt it was too long and risked burnout. Those who felt the workshop was too long pointed in particular to the difficulty of focusing late in the afternoon and evening of the second day of the two and a half day retreat. “In terms of time, it’s at the limit of where it can keep us focused.” Those who found it too short stated specific interests in going more into Whole Measures, in tying the ideas together operationally, and beginning a process of organizational visioning.

Flow of the process

Several interviewees commented on the power of the “flow” of the workshop. As mentioned earlier, even those who expected a more or less straight-forward presentation of Whole Measures in retrospect found it logical to spend the workshop leading up to where Whole Measures “made sense.” One interviewee described the process of the workshop as invisible, “I went there being interested in the process, but I ended up sweeping along with it,” however, the very intentional process of helping participants connect with their personal and professional values was articulated repeatedly by others. For example, interviewees referred to case studies, bringing and sharing objects of significance, exercises around terminology and story telling about why you do this work, envisioning the future together, and various other methods the workshop employed as critical parts of the process that lead them to the workshop’s conclusion.

Content

Five people pointed to the use of Martin Luther King’s dream speech as being especially compelling. In particular, they emphasized the inspiration it brings to their day to day work lives to think about the fact that that Dr. King had a dream and a vision as opposed to a plan. One interviewee said that the King speech detracted from the workshop because he did not find it particularly relevant to the group that was gathered, “I got the intent, but it didn’t connect with me personally. Since almost all of us there were environmentally based ... I know the intent was to bring in an inspirational voice across sectors, but it felt out of place.” Another, although grateful for King’s contribution, felt that other voices should be included, “Maybe in the future having additional people to point to in addition to Kennedy and King, maybe Latino leaders and of other ilk and ethnic groups, more examples of looking at inspiring leaders from more of a cross section.”

Referring more broadly to the workshop curriculum, one person found the social justice bent of the workshop did not exactly “fit” for the audience of land conservationists, “It came so strongly as a social and environmental justice ... and those are things that we all need to think more about, but we’re not necessarily operating in those systems.” Others, however, saw clearly the connections between land conservation and social and economic justice and experienced the workshop as a wake up call to make explicit and more clearly operationalize these connections in their day-to-day work:

“Looking at the social justice end of things and the economic vitality is very important. We can’t just be land conservation agencies anymore, we have to

think in a different way, build communities differently. We have to bring in housing and other things. We all think about our relationship to the land but we've gotten too bogged down in doing the deals. We have to do things in a different way.”

Message/messenger

A point raised several times was how, according to some, much of the workshop experience is “made” by Peter, in particular his gifts as a storyteller and presenter, as well as his general demeanor. For example, one person shared the following about how Peter’s approach and demeanor created a space that felt different from “business as usual” for her organization and her colleagues, “I really remember the very first day Peter talking about [and] addressing people in an endearing way – he called the executive director ‘Dear Wes.’ It was really unusual in a work space and it helped to create a sense of a special place for me.” In terms of content, one person did note that Peter relies heavily on slides, images, and words, however, this wasn’t seen as a bad thing as long as Peter was able to keep the presentation “fresh.”

A disadvantage noted by one participant of an experience “made” by Peter is the challenge of trying to replicate a “message” that is so embodied in the messenger. “What’s so hard about whole communities is that Peter is so good, it makes it hard for the rest of us translate it in quite that way.” This embodiment may also contribute to creating an unrealistic expectation that one individual (in this case, Peter) will (or can) always “hold” the message.

In a number of interviews, people referred to the “choir” (of which they are a part), Peter’s somewhat preachy style, and a fairly clear goal of bringing workshop participants over to his way of thinking, “... there’s a sense of being programmed towards an end – programming us towards a different way of thinking.” While this was fine, even desirable, for all interviewees who identified these characteristics, some did point out that it is a style that works more for some than others:

“Peter’s style doesn’t resonate too well with a board like mine – they feel like they’re being preached to, it’s evangelical. I like that – my staff and I see ourselves as disciples and we’re into it. It’s off putting to people who live in Pebble Beach and have made millions of dollars, they don’t buy it. “

Follow-up

The most frequently cited downside of the workshop actually had nothing to do with the workshop content or presentation, but more with the ability of the alumni to follow-up what was initiated at the workshop. This “what do you do when you get back to work?” quandary is reflected in the following quotes:

“[We needed to have] followed up with the invited folks because we built up energy and potential expectations.”

“I left the workshop feeling completely jazzed that there are all these amazing things we could do, but then we just went back to our regular lives. I was hoping it would jumpstart the networking effort we were working on. And that effort has continued creeping along ...”

“We, the partnership (me), should have done more to follow up with the outsiders that came, so we lost a thread. Maybe didn’t lose the relationships, but we didn’t capitalize on them.”

While interviewees took full responsibility for charting their future course and next steps, many did suggest specific ways in which CWC could provide support and assistance in this area (see Section IV, Alumni support and future roles).

Retreat experience

Past post-retreat interview protocols led interviewees through the specifics of the retreat, asking them to comment on each aspect. The protocol used for this set of interviews was more general, asking interviewees simply to describe their experience and the things they felt contributed and detracted most significantly from it. Despite the lack of detail in the protocol, interviewee responses consistently featured the broad array of retreat methods and tools – the meditation, dialogues, silence, chores, meals, yoga, work sessions, walking, storytelling, spoon carving, community building – of the retreat experience.

Flow of the process

Like workshop interviewees, retreat interviewees commented frequently on how the different components of the retreat seemed to “fit,” that there was the comprehensiveness and intentionality of the experience that made sense. “The rhythm of the day works – it feels natural and how it should be.” One interviewee went as far to say, “I don’t think there were very many wasted steps – literally and figuratively – everything had a purpose”

One thing reinforcing the natural flow was the blend of flexibility and structure that created a sense of responsibility to the community and the process, yet allowed for choice and options. As one interviewee put it, “nothing felt lock-step.” Another contributing factor was the time built into the program to arrive, adjust, and acclimate, “I like the way they introduced us to it ... the first day there was little to do but to be welcomed.” It is worth noting, however, that particularly for long-distance travelers, the trip to Knoll Farm and occasional mishaps during it sometimes impinged on the experience, perhaps calling for even more flexibility and support, “The first night I got there late and walked into the first gathering and understood a little bit, but I had this big duffel with all of my stuff and I didn’t get a lot of help in getting to where I was going ... we took the long way to my site.”

Silence, meditation, and dialogues

The silence, meditation, and dialogues came up most frequently as contributing significantly to the experiences of the retreat, and many described them as mutually

reinforcing elements of the overall experience. For example, meditation brought people to the present and provided space to ask the questions that came up, such as, “What am I doing here?” and “What’s important to me?” Silence contributed to the ability to be intentional in the dialogue process. Dialogue facilitated exchange and opened awareness about things like role, commitment, and engagement in the community:

“The dialogues forced me to think about things that didn’t factor ... it forced me to think about people in human communities, my own role personally as a member of this big organization and the responsibilities I bear for it to do the right thing. And to have the courage to speak about what I knew was true.”

While they were strong contributors, the meditation and dialogues were also two aspects of the retreat that interviewees most commonly reported making them uncomfortable. The dialogues were often awkward or intimidating and the meditation, for those unused to it, was hard and sometimes felt like overkill. Despite this, few thought the meditation and dialogue detracted from the retreat. In fact, most of the critics joined the sentiment of the above quote that the meditation and dialogue helped bring them to awareness and openness that they wouldn’t have otherwise achieved.

Privilege walk

Another retreat tool that came up repeatedly in a similar push/pull dynamic was the privilege walk. A number of people, across differences, were surprised by the experience and the emotion that emerged through it:

“The only thing that took me very much out of my comfort zone was the privilege walk ... I was struck by how emotional it was for me and everyone else. [It was a] very raw moment.”

“The main thing that I was a little affronted by was the privilege walk ... It was an eye opener.”

“The most intense was the privilege walk – that was real uncomfortable for me. I had a tough time sleeping that night. It pushed me to think about race and privilege in my life, things I could have done differently.”

As the quotes above suggest, like the meditation and dialogue, the privilege walk pushed participants into difficult and sometimes uncomfortable places in themselves. This process often opened up space for reflection that might not otherwise have happened, “I’m not saying it was a negative for me, it just made me think.”

One interviewee commented that he particularly liked the privilege walk because it took the pressure off of him, as a black person, to bring up the hard issues related to race, power, and privilege, “As a black person it was nice not to have to raise the points that came up ... It made some people feel bad, cry, feel guilty, but that didn’t have to happen through a banging my fist on the table kind of way.”

Although there may be a correlation to be made between the discomfort of certain methods and a “growing edge” that participants experienced at the retreat, it might be worth reflecting on whether there would be value in modifying where, how, how much, and in what combinations these different tools are used. The ambivalence about the privilege walk expressed in the following comment seems to be an invitation to this kind of reflection:

“...it’s interesting that that [the privilege walk] is the watershed exercise, that everything is different, yet the same. It’s interesting that that’s the hook that we spend the rest of the week thinking about that. Some of us felt like it was home run in that it highlighted the gulfs between and among us. Some of us felt like there might have been other ways to introduce that. Some of us felt conflicted – felt those things at the same time – are those the right questions? Leading us in the right direction? I wouldn’t change it, but I was struck that that’s how we started the conversation about our differences and common histories.

Other tools

Interviewees described the spoon carving, hands on the land, storytelling, and meals as opportunities to go more deeply into the retreat experience, learn more about themselves, and be together in different ways (both passively and directly). Like the meditation, silence, dialogues, and privilege walk, the experiences with spoon carving, hands on the land, storytelling, and meals, while overall good, were difficult and detracting for some and had opposite impacts for others. Some examples include:

One person thought the spoon carving detracted from the experience because it imposed a sense of schedule and needing to complete something, which felt out of sync with the spirit of the retreat. On the other hand, two participants described abandoning the spoon as examples of the flexibility they found in the overall experience.

Two people found the hands-on-the-land portion of the retreat less effective than it could be, in particular because it was too short and gave participants a taste, but not enough of the experience. On the other hand, one of these interviewees acknowledged that it was through the hands on the land experience that his group had a breakthrough experience.

One person said that although he had a very powerful experience through the storytelling experience that he observed it had a tendency of taking on an aspect of performance in a large group, creating dynamics around competition, reluctance to share, and etc.

Facilitation

A number of interviewees underscored the critical importance of good facilitation for many aspects of the retreat experiences, including the dialogues, storytelling, and the privilege walk. In addition to guiding the discussions “so that they were not all over the place,” the facilitators and yeast provide a space for going beyond the surface. “... it gets

you talking and pulling out these concepts you haven't thought of before, and then everyone builds on that." One person noted a particular appreciation for the fact that the facilitators and yeast did not have all of the answers ("I got the sense early on that the people in charge were there to learn from the group, as opposed to being these Zen masters that knew everything,"), but went through the process with the participants and at the same time provided "first rate" facilitation.

While several interviewees referred to the strong facilitation from which their retreats benefited, an even greater number suggested that facilitation capacity in the retreats be strengthened in order to help groups grapple with "tricky" issues. Two interviewees specifically commented that their yeast could have been stronger at pushing the group to consider challenging concepts. Another area for strengthening facilitation was general "group management," for example, creating a space for participants who are habitually quiet to challenge themselves to "step up" and for participants who are more habitually talkative to challenge themselves to "step back." Finally, one alumni cautioned that because the retreat often helps individuals bring to the surface emotions and issues of which they might not have been previously aware, sound facilitation is necessary to ensure that the dialogues and other group processes do not become "therapeutic" spaces.

Diversity

The issue of diversity as it relates to the composition of the retreat groups came up mostly as a positive asset of the retreats. However, three participants of color pointed to what they felt was a lack of diversity and the difficulty this created (for them) in conversations about diversity, "... as one of four minorities in the conversation, when we got to conversations about diversity and inclusion it became a little uncomfortable." In these cases, interviewees highlighted the importance (and success, in some cases) of retreat facilitation to create a safe space for sharing. Even in settings where there is more racial balance, one person of color highlighted her discomfort in "diversity conversations" with participants for whom concepts related to power and privilege were new and unexplored,

"... there was a real gap in understanding about issues of diversity between people of color who work in that area and folk for whom all of this was new. Managing the gap was challenging ... I don't go to diversity training unless I know it's going to be higher level training or all people of color. To have to witness the learning of the white folk can be painful because we feel like they're learning at our expense, like we have to convince people this is real. I kind of opt out of those things in my life."

Once again, facilitation was raised by this interviewee as a key element in ensuring that all participants take equal personal responsibility for learning in sessions about diversity and power. The above quote also speaks to a possibility that some work be done beforehand to ensure that people arrive at retreats with some level of awareness and understanding around pertinent issues addressed in the retreat.

A white participant expressed her frustration with what she felt were the contrived nature of the conversations related to race, "...when we were put into a group setting it felt

forced. It seems like there were issues around race that have come up in the past [in past retreats] and they felt like we needed to go there.” More nuanced facilitation might have helped this participant explore privilege, power, and others issues that exist in most groups in a way that did not feel pushed upon the participants.

Finally, one interviewee suggested that it would support the efforts the retreats are making related to diversity if more diverse voices were added to the readings and curriculum. The interviewee who made this point also suggested that it is not necessary to rely solely on CWC to do this – that alumni could also contribute to the “canon.”

Re-entry

Like the workshops, one of the most frequently mentioned challenges of the retreat was the follow-up and re-entry into regular life and work. A number of interviewees talked about the apprehension before leaving Knoll Farm, the difficulty in keeping the experience present and fresh, and the challenge of figuring out the “what next”:

“I found as I got towards the end, I had an interesting mix of anxiety and hesitation to leave. I didn’t want to leave, but I knew I had to get back.”

“I’ve struggled with the “So what now?” It was so refreshing to be with a room full of people who aren’t with conservation, but now as an executive director of a land conservation organization, I’m wondering what do I do with this, how do I live this, how do I take my organization to a different place.”

“One of the challenges is trying to figure out how to make sense of this afterwards. It’s hard to figure out how to take the momentum and not just put the experience in your pocket.”

“The only thing about some of the after the retreat feeling was how ephemeral it feels and the fact that I can’t really articulate what I’ve learned. The saddest thing was how I was so centered and so together when I got home and it lasted maybe four days.”

“The roughest thing was the re-entry process. That’s been the most difficult thing – these people that I met and did some growing up with, what’s the right math on staying in touch and maintaining this connection? ... in a way it’s not the idea to try to maintain that community because my community is here where I live and work.”

These same interviewees provided specific suggestions on maintaining connection and keeping the ideas brought up during the workshop present (see Section IV, Alumni support and future roles).

SECTION II

How are the workshop and retreat different from one another?

Most workshop/retreat alumni that attended the workshop first felt that the workshop provided intellectual and conceptual preparation for the retreat and while some reported repetition, they found it reinforcing rather than redundant. A couple of alumni said that they expected the retreat to build on the workshop more than it did, “I’m certainly richer for having done both, but I guess I expected the retreat to build much more on the workshop and expected them to be more similar, just different lengths.” Of the seven interviewees who attended the retreat first, six organized a subsequent workshop with their organization as a means for reinforcing and multiplying the impact (among colleagues) of their retreat experience.

When workshop/retreat attenders characterized the workshop and retreat experiences relative to one another, many talked about workshop as an introduction that provides some, but not all, of the tools and language. Others characterized the retreat as more in-depth, “The workshop ... provides a taste for the deeper experience of the retreat.” The perception of the workshop as a “start” implies that it is an experience requiring follow up. This is as opposed to the retreat, which (despite myriad suggestions for support and assistance to retreat alumni – see Section IV, Alumni support and future roles) most saw as a stand alone experience.

More information and more time are two aspects that contribute to the depth of the retreat experience – for example, one interviewee said that the retreat’s weeklong format provides time to “fall into the experience”. Other equally important aspects include the spirituality focus and the community building components of the retreat, which are less overt in the workshop. Another perceived difference which may also speaks to depth, is “concreteness” of the workshop, as opposed to the “open-endedness” of the retreat. Finally, in terms of presentation, interviewees described the workshops as exactly that – a presentation of the information, “...he [Peter] engaged us significantly, but the ideas are coming from him.” This is different from the retreats, where alumni reported an experience of grounding the information presented in back-and-forth exchange and of living it through a week of facilitated internal reflection and community building.

One interviewee distinguished the workshop and retreat as personal and professional, respectively. From this interviewee’s perspective, people seeking reflective space should do the retreat and those seeking to achieve a common professional goal as a group should do the workshop. While this distinction may be useful, it is perhaps too black and white because one of the most significant realizations reported by workshop-goers is the very point that the professional *is* personal. Although the workshop is focused on the work of organizations, interviewees referred repeatedly to how it also gave them tools for reconnecting with their personal values, examining them, and connecting them with their work. Comments that reflect this include:

“The other thing that’s really important, most important at the core, is doing purpose-driven work and understanding what our own core values as human beings and organizations are.”

“It was kind of a consciousness raising experience of getting reconnected to values and the importance of dialogue with other people around values, reinforcing importance of relationships.”

A final difference between the workshop and retreat is that the workshop is perceived as being tailored to the land trust community, “I thought it was well geared towards land trusts,” while the retreats are perceived as catering to a broader audience (although the retreat interviewees were also predominantly from the conservation community). Perhaps related, the issue of Peter as the messenger surfaced more as a preoccupation in the workshop interviews than it did in the retreat interviews.

Which would you choose?

There was general agreement that the two and half day workshop is more conducive than the week long retreat for a larger group, mainly because more people would be able to commit the time. As mentioned above, even the two and a half day workshop felt too long for some participants – one interviewee repeatedly raised the point that a one day version would attract a stronger following, particularly among her board members. Another interviewee mentioned that although staff found the two nights together beneficial, it did create a certain level hardship, particularly for people with young children.

Although almost everyone interviewed talked about the retreat as a tremendous personal experience, a number of interviewees thought that workshop might be better for a full organization more because, according to interviewees, it appeals to a broader audience and “fits with more styles of learning.” Because the majority of interviewees commenting were associated with land trusts interested in appealing to their boards, this reference may apply more to land trust board members than it does to the general public. It might be more accurate to say “that the workshop fits more than the retreat with current and traditional land trust board member styles of learning.”

One person made the point that the workshop is more effective than the retreat in building long-term community because workshop participants are generally people from the same organizations and/or geographic areas. Given this, there is a good chance that people will continue working with one another and have the opportunity to draw on and implement the lessons from the workshop after it is done. This same person attended the retreat and although he had a very rich experience at the retreat said, “... I had less direct hope that it would translate into something immediate because it was truly a group of strangers that all left to go their own directions. I left the retreat feeling less action-oriented than I felt leaving the workshop.”

SECTION III

What changes have the workshops catalyzed?

All of the workshop interviewees are associated with organizations that have had one or more staff and/or board member, participate in CWC programs other than the workshops (retreats, events at the Alliance Rally, and etc). Thus, the specific impact of a person's workshop experience on an organization is harder in some cases than others to tease out. This is different from the retreats, where several among the retreat-only group were the only (or one of few) to go through a CWC program.

The most frequently mentioned change by workshop goers was an increased ability through a shared language to talk about things like breaking down silos, building dialogue among partners, engaging the community, and values-driven work within the organization. More ease in exchange also came from the "permission" the workshop gave interviewees to be passionate about their work. Most felt that increasing the number of colleagues and partners participating in these conversations relies somewhat on getting a critical mass through the workshop (or other experiences that catalyze similar change). "It's not a good idea just to have one or two people to go through it. [We have] a group of people, including a board member, really sold on the concept, enough to carry some momentum."

For many, the workshop has provided a new lens through which to see and talk about their work. It is a lens people reported using to engage colleagues and partners in new conversations:

"...before going to a meeting, I look at the agenda and see how Whole Measures can fit in."

"... I reconnect back to it whenever we have a chance ... we're doing coalition building on the city side of things (grassroots advocacy), we're trying to figure out a way to talk to them about open space protection. I draw on this as I think about how to talk with them."

This lens, in some cases, has also helped organizations and individuals re-articulate what they do in light of a new set of values. In some cases, this was translated into a change in how an organization measures and defines success:

"[In] our year end appeal letter I deliberately left out any reference to acres protected. I just said, you know what, this year I'm going to do a letter and I'm not even going to talk about that, I'm going to talk about how we touch people's lives."

"I'm interested in doing smaller projects with a greater ripple effect on the communities, rather than larger projects measured by acreage which may be good

projects but have limited ripple impact. My concept of success has really changed. “

The workshop also provided space and tools for personal reflection which, for some, has resulted in changes in the way that interviewees see themselves in their work and in relationship with the people they are working with and on behalf of. In particular, interviewees referenced having tools and a new lens for reconnecting with their personal values, examining them, and connecting them with their work.

Finally, interviewees underscored to the role the workshop has played in helping to begin a conversation about what community engagement means for their organizations, “We’re always trying to get our arms around what that means, these concepts will help us figure that out.” These conversations have resulted in identifying opportunities for partnering with and in the community in a variety of ways at various levels. Some examples include: making a land trust’s projects more visible to the public, merging a land trust with an urban garden organization, playing a mediation role among diverse organizations in a community to achieve a common project. Some of this work was ongoing before participation in the workshop, and in these cases, interviewees credit the workshop with providing the inspiration for moving forward and going the next step.

What changes have the retreats catalyzed?

Unless a special organizational retreat is arranged, most people go through the retreat without other members of their organization. Some of the retreat-only interviewees were actually the only or one of few individuals in their organizations that have been to a CWC program. While few retreat-only interviewees reported that their organizations are currently seeking to make overall change, a number went back into their organizations motivated to make change from their individual positions:

“I came out being more proactive about shaping my job ...I made a more conscious effort to get myself involved in those [diversity] elements of the organization’s work.”

“The way that it affects me in my work is that I’ve reprioritized ... I try to be more sympathetic, I try to listen, try to understand what it’s like to be doing what we’re doing. I don’t measure what I have to say, but I try to measure the time between and let things soak in.”

“If nothing else, I’m aware of it in a way I wasn’t before ... I think it probably has changed my actions more than I’m aware of.”

Certain interviewees (organizational leaders and others) are making overall organizational change as a result of the retreat:

“I’ve made major changes – bring the natural world more front and center [not just] to the biology department, but actually to the campus.”

“We have to make sure that we’re making sure we invite, welcome, and listen to all perspectives, including those we might not otherwise have thought of ... It wouldn’t necessarily have happened, it’s not really engrained in the organization to operate this way – to make sure whatever we do serves the community first and foremost.”

“As I was sitting in the airport in Burlington [after the retreat] I had a conference call about restructuring the organization and it was perfect timing because I was able to articulate the changes I would need to make in my job to move where I want to move. I was able to say where I am with my thinking and where I think we should go as an organization.”

Other concrete actions interviewees reported undertaking as a result of their involvement in the retreat included:

- Conducting a successful focus group structured around storytelling.
- Creating a new organization.
- Taking a leadership role to facilitate change related to land use and land access in the community.
- Talking, reading, leading a class.
- Fundraising for scholarships for the Alliance’s northeastern conference, which will include sessions on diversity and community engagement
- Facilitating partnerships and mergers with organizations involved in urban gardening and other urban initiatives

Much of the change retreat alumni shared was personal change related to how they see themselves, how they see their work, and how they see and engage in their relationships, all of which affect profoundly the way that organizations operate. Specifically, some of the personal changes interviewees attributed to the retreat include “making resolutions or intentions about how to do things differently,” “doing the important things rather than the urgent things,” “taking care of myself for the long haul,” and “re-engaging in things that give me joy and are good for me, like meditation, yoga and singing.” Other personal and relationship-oriented changes included:

- Listening more to students
- Invite, welcome, and listen to different perspectives
- More courage to speak up with colleagues and against silos.
- Attentive to the difference between being a manager and being a leader.
- Seeing the community as a partner – make sure we serve the community first
- Recognizing obligations as well-off organization.
- Increased awareness of the static that grows between people in conflict
- More forthcoming about spirituality
- Willingness to share more of my inner self with my community

What's hard about making change?

Broadening the conversation

A number of people have either used the workshop or seek to use the workshop as a means for bringing their boards and a broader community into the conversations that have begun in the staff as a result of involvement a workshop or retreat. This is a challenge because, in many cases, the board is not as far along with “Whole Communities” thinking as the staff, “...here it's been a staff driven process. We've been reinvented the land trust. My work has been to bring the board along.” In fact, some interviewees felt that the orientation and actions of their boards are sometimes at cross purposes to what the staff is attempting to achieve, “We're a big group that the board has just hired three more lawyers to defend us more in court. So it's going to be hard to change the direction of the ship – I feel like I'm doing it by myself.”

Introducing and finding language to “translate” Whole Communities work, particularly to board members who haven't thought about land conservation work in a way that articulates with a broader set of goals and partners, was raised as one of the biggest challenges among workshop attenders. One interviewee said, “Most Land Trusts are upper crust in their nature and membership, it's hard to translate it into their language ... How do you go into conversations about diversity with people who have never talked about it?”

Doing the work

Beyond communicating and building support for changing definitions of success, working across “silos,” and engaging a broader base of constituents, there is the challenge of actually *doing* it. As organizations delve into community partnerships, the very concrete, complex, difficult, and gritty reality of work that is truly based in the community can deflate the inspiration created at a workshop or retreat:

“We're trying to broker partnership with the parks department and Boys and Girls Club, but they don't get along or trust one another. We're giving the land, but we're put in the position of being the mediator. It's really hard work, that doesn't mean it's not important, but it's hard to be inspired when there are so many headaches.”

One part of the challenge of *doing* is building staff capacity that matches the desire to do the work. The skills required to build and participate in partnerships across differences and facilitate dialogue and collaboration in those partnerships, for example, may be all new to an organization. As one person explained, “It's a challenge because the new conversation is about things we don't know how to do – in some ways it's slowed the project down.” In addition to new skills, organizations may need to develop in other ways, including hiring staff that reflects the communities, commitments, and types of work an organization is trying to achieve. Although organizations may be interested in the programmatic changes, more internal change is hard and it is often contested. As one interviewee put it, “The ground is fertile, but the boundaries are firm.”

Getting support

Finally, interviewees talked about the need to build new professional associations and partnerships, not just for getting work done, but for support, learning and exchange. Some land trusts are finding that the allies they need for the broad kind of work in which they seek to engage are simply not in the land trust community:

“Rally doesn’t serve me anymore. What would serve me is a gathering where we delve into conversations about building a more diverse workforce and being with people that challenge our thinking.”

“I’m on the board of the Highlands Coalition ... It’s a younger crowd, I’m finding that they’re more open to this stuff than the older people are. I’m finding more interest in diversity coming from the younger folks, so it’s got legs in the strategic plan.”

SECTION IV

Alumni support and future roles

Although almost all workshop interviewees and most retreat interviewees were able to rattle off a long wish-list of activities when asked how CWC could provide additional alumni support, there was a small core of retreat alumni who felt that the retreats need little follow up. These people felt that the retreats do exactly what they are intended to do by opening people up to a new way of thinking about their work and personal lives and about their relationship with others and with themselves.

“I don’t think there needs to be any kind of great intentional next steps – it’s more giving people a lens or perspective on their work.”

“...the role of CWC is to inspire and make you think, and not to really provide specific tools for getting things done where you live or work.”

“I think it really is that you go through the process, you grasp the pebble from the master’s hand, and then you leave. There might be ways for being useful, but for me, I wouldn’t use a 24-hour care line, it’s more of an internal thing.”

In this spirit, the current mailings and gatherings facilitated by CWC create an adequate feeling of support and provide inspiration through glimpses into what others are doing, and this is sufficient.

Enhanced communication

Many agreed that the role of facilitating information exchange and occasional connection was an appropriate one for CWC to play – and they had suggestions for enhancing this role, including:

- Include more stories of alumni work in the “Whole Thinking Journal” – maybe encourage teams of alumni to get together to write articles on what they are working on and how they are addressing challenges.
- Film a video clip of someone on staff sharing a story or someone who has been through a retreat talking about how it’s changed their work.
- Do a DVD with a collection of these things.
- Provide rotating content on the website that involves video blogs by staff, periodic video or textual blogs by people who have been through the program – how it changes what they do. It’s constantly refreshed and updated portals back into the experience.
- Have a regular feature on the website – Caleb and Jean talking about local food, the land stewards talking about what they’re doing, etc.

Multiple workshop packages

While most people were very satisfied with their workshop experience, a number of them had suggestions for variations on the workshop, mainly for audiences to whom they are trying to appeal. For example, a one day version for people who can’t spare two; a

workshop with slightly different approach (less preacher/choir); and one less “tailored” for the land trust community and applicable to other sectors and individuals interested in the Whole Thinking concepts.

Retreat location

Like the workshops, many of the same people who loved their experience had suggestions for doing it differently to reach a broader range of people. “They need to come down from Knoll Farm and do more of this work in locations that would allow more people to be exposed.” In particular, retreat suggestions focused on holding Whole Thinking retreats in places other than Knoll Farm. The majority of these suggestions were for a regional approach, which interviewees argued would be more focused, relevant, and accessible. Ideas interviewees shared included:

An “implementation center” in Chesapeake Bay area where organizations and communities can engage in values based inquiry can happen

Programs that focus on the brewing potential on the west coast, particularly the Bay Area

Programs that focus more on the reality of the west – Colorado, New Mexico, Arizona, Wyoming, Montana, etc – where questions and solutions around land are much different than they are in the northeast.

Alumni connection

One of interviewees’ main requests for support was for more connection with other alumni. A role of “network manager” could be played by CWC at various levels of investment and intensity. Some examples include:

Case studies

Provide more examples of alumni and others doing “Whole Communities” work. The desire for these examples may be satisfied with the CWC “What is a Whole Communities” book currently in production. This book will include case studies of organizations involved in work that crosses boundaries and engages a broad based constituency.

Mentoring and peer-to-peer exchange

Even more than case studies, interviewees were interested in exchanging with experienced colleagues, particularly those in the same region, about developing new partnerships and approaches. To achieve this, CWC might help to develop a mentoring program where less experienced organizations could be paired with and learn from a more experienced role model or mentor. Of course, there would need to be some kind of incentive for the mentor organization to make this program viable. Exchange could also be facilitated between and among peer organizations, or organizations with similar levels of experience.

Alumni exchange data base

One way that interviewees felt CWC could help with facilitating this kind of learning was to develop an alumni data base organized by geographic and programmatic areas. If someone was interested in working with ranchers, they could search “ranchers,” if someone was interested in people working in western Wyoming, they could search that and if they were interested in organizations in western Wyoming working with ranchers, they could search that.

Conference

Another suggestion for facilitating exchange was to organize a “Whole Communities” conference, with sessions led by alumni on various topics organizations are currently grappling with, such as “hiring a diverse workforce” or “getting your board on board” or “conflict resolution between non-traditional partners” or “facilitating dialogue between open space and social justice organizations.”

Nominations

The importance of the nomination process, and actively encouraging alumni to take part in it, was underscored by several interviewees. Some reported that the retreats are often in their mind when meeting new people and others mentioned that they use the nomination process as a means for building a critical mass of like-minded colleagues and practitioners in their communities and organizations. One person suggested that CWC provide explicit guidance to nominating alumni on how to use their nominations in this way. Another interviewee expressed a bit of concern that the sentence in this year’s nomination form that reads, “Someone who’s work is unconnected to land is unlikely to find the program relevant ...” may send a message that the retreat is only relevant for people directly involved in land conservation.

Self-facilitated gatherings

Finally, CWC could encourage alumni in different geographies to gather periodically and, perhaps using dialogue techniques, have conversations that explore questions such as: how are we implementing this work in our lives and work, what can we do differently as leaders in the movement in our different areas? Doing this might entail CWC identifying and following up with “sparkplugs” in different states, cities, or communities that have particular enthusiasm and passion for Whole Communities work and who would embrace the opportunity to gather with kindred souls. Out of these gatherings might emerge something as grand as a joint project or something as simple as a potluck dinner.

Direct training and technical assistance

Interviewees expressed interested in increasing individual and organizational capacity to build partnerships, engage communities, and operate across sectors. Interest was expressed in: dialogue, bridge building, and facilitation; cross-cultural communication and cultural competency, and storytelling as a means for exploration and relationship building. Although delivery mechanisms for this kind of capacity building were not discussed in detail, below are some brainstorm thoughts for different “broker” type roles CWC might consider playing to help meet training and coaching needs:

Train-the-trainer

CWC could sponsor occasional train-the-trainer workshops for professional trainers who specialize in, for example, facilitation, cross cultural communication, or conflict mediation. The CWC-sponsored training would expose trainers to CWC's theory of change and Whole Thinking language. After going through a CWC workshop, these trainers could be included in a CWC database and matched with workshop and retreat alumni seeking expertise in these areas. Effort might be focused on identifying professionals from various regions in the country to attend the CWC training to ensure geographic distribution. I believe this model of training the trainer is along the lines of what the Institute for Conservation Leadership is currently using. We could possibly talk with Diane Russel (executive director at ICL) for more information. <http://www.icl.org/>

Train-the-consultant

A more specific area CWC in which might play a train-the-trainer role might be with the Whole Measures tool. In this scenario, CWC could gather a cadre of consultants experienced in participatory monitoring and evaluation to provide training in the Whole Measures tool. Once people were trained in Whole Measures, CWC could respond to requests for Whole Measures technical assistance by referring alumni to Whole Measures-trained consultants. If CWC was interested in exploring the idea of a Whole Measures training for consultants, the Leadership Learning Community is an organization focused on facilitating learning among leadership programs and they have a particular interest in monitoring and evaluation. Deborah Meehan is the executive director. <http://leadershiplearning.org/>

Train-the-coach

A number of interviewees (particularly retreat interviewees) expressed interest in receiving coaching to help them stay on track and stay inspired after the retreat. One way to respond to this need might be to provide training for a number of consultants (perhaps CWC faculty or people with those kinds of profiles) to coach in a way that is consistent with CWC's approach. Once coaches were trained, CWC could offer "coaching subscriptions" between organizations or individuals and the trained coaches. I'm not aware of any other organization that plays this role with the coaching.

Administration

CWC could consider various administrative and pricing structures. For example, CWC could ask trainers, consultants, and coaches to pay their own expenses and possibly even require an attendance fee. This decision may be influenced by the importance and benefit of the program to CWC institutionally, for example, CWC has an interest in increasing the use of Whole Measures, so they might provide more subsidy for that training program than they would, for example, for the train-the-trainer or train-the-coach program. Following the training, CWC might play an administrative role in connecting the organizations with trainers, and could perhaps ask for an administrative fee to cover the costs of this role (the fee could be made invisible to the organizational client by including it in the cost of the trainer/consultant/coach to the organization). Or perhaps they could simply provide a directory and let organizations and trainers find one another.

Consultant “rolodex”

If CWC did not want to invest the level of effort necessary to undertake the training of trainers, consultants, and coaches, they could consider simply having a database of these same trainers to use in making referrals for alumni. These trainers would not have the CWC “seal of approval” that the above workshops would provide, but CWC could still make referrals without providing endorsement. I believe this type of consultant/client matching is similar to the role that the Environmental Support Center plays for its grantees and constituents. <http://www.envsc.org/>