



# THE CONVERSATION LABS:

## AN EXPERIMENT IN FUNDER/PRACTITIONER DIALOGUES

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As a former foundation staff member and current executive director of nonprofit LeaderSpring, I am intimately familiar with how power dynamics can limit honest conversations between funders and program practitioners. Practitioners are sometimes reticent to acknowledge real challenges they face, fearing that funders will be less likely to support them. Funders, however unintentionally, sometimes withhold information in ways that can impede understanding and partnership. I am also familiar with how the pressure for immediate results can get in the way of our ability as practitioners and funders to take time for reflection and to cultivate long-term collaborations. How do these and other challenges prevent funders and grantseekers from doing our best work at solving social problems?

What might happen if philanthropic and nonprofit leaders agreed to come together with no expectations other than to engage in honest conversations about what works and what doesn't? Could this type of dialogue lead to new understandings and ideas of how to solve social problems? Two of my funders, the S. H. Cowell Foundation and The Whitman Institute, and I decided to find out. We convened a group of San Francisco Bay Area funders and practitioners of leadership development programs to engage in open dialogue. In this article, Hugh Vasquez, the facilitator of these "Conversation Labs," and I share the story of this rare six-month dialogue series. In essence, it is a story of how to build trust among funders and practitioners as they navigate issues of identity, privilege, and competition.

At the outset of this exploration, I couldn't help but wonder, "Could introducing LeaderSpring's funders to other program practitioners result in increased competition for my organization?" Ultimately, I was inspired to help with this effort based on an overriding belief that by building stronger relationships between funders and practitioners in the leadership field, we

could achieve breakthroughs in our work of strengthening community leadership.

Hugh Vazquez had a similar motivation:

My interest in facilitating the Conversation Labs came from my desire to create a space where leaders could critically reflect on their work and allow for innovations to surface that would help them achieve their desired social change. Engaging in the same old conversations almost always produces the same results. If we wanted different results, we would have to do something differently. We would have to build honest, authentic relationships and agree to have conversations without knowing the outcome. If we could do this in the Labs, we might create leadership innovations that would make a difference.

## Core Conversation Strategies

Seven funders and six leadership program practitioners enthusiastically signed on to this experiment. We developed a design for the dialogue series (an introductory half-day session, plus five three-hour sessions), identified a professional facilitator, and invited key philanthropic and community stakeholders to participate. For those interested in hosting their own funder/practitioner dialogue series, we have listed key elements at the end of the article which we believe contributed to the success of our experience.

We convened the group using three core strategies:

First, we requested that participants commit fully to the sessions (a minimum of 80% participation). This structure fostered group cohesion, continuity of the discussion, and conversations that were generative rather than repetitive.

A second strategy was to create a deepened level of conversation beyond what we commonly found in spaces where funders and grantees come together. Personal storytelling at the outset of the experiment was instrumental in creating a trusting space and strong foundation where everyone felt comfortable to take risks and share deeply. Having a physically comfortable space that had a “living room-like” feel further encouraged candor and openness.

A third, and even more unusual strategy, was to have no explicit, concrete outcomes. While we had a shared sense of purpose, no one knew what shape the conversations would take or where they would lead. We crafted our agendas by asking participants to identify discussion topics at the beginning of each session. One participant said, “We were all invited to be part of a process experiment without a predefined destination. We were embarking on a journey of discovery for both the individual and the group, but we had to be willing to submit to the ambiguity and the possibility that we might hit land or not.” Another commented, “I was thrilled we didn’t need to accomplish anything other than to listen and to be heard.”

## Conversation Topics

Honest conversations occurred naturally because of the bonds of trust built at the beginning of the series. Conversations centered on issues not commonly discussed, including systems of advantage and privilege in philanthropy and the nonprofit sector, that led to some unexpected insights. Bob Uyeki, executive director of the Y & H Soda Foundation, said:

The Labs helped me reflect on things that I’ve been thinking about for some time. For example, during the Labs a fellow funder shared the experience of not always feeling affirmed by her board, followed by a nonprofit leader who reflected that she feels fully affirmed by her board. These comments helped reinforce what I’ve been hearing from others in the field – that in foundations, the locus of power primarily resides

in the foundation trustees, not with the foundation staff. Yet, in nonprofits, I believe it is more likely that the locus of power rests at the staff level. This makes me wonder, to what degree are we as funders legitimized and affirmed to be ourselves, and how does that help us to be our best (or not)? I think my sharing this insight helped the program practitioners in the Labs gain a stronger understanding of the challenges funders face in their roles – and helped them better understand and appreciate the advantages they may possess as practitioners. The Labs also helped me better appreciate the real challenges people are facing at leading nonprofit organizations, especially in the worst economic crisis of our times.

In one conversation we explored issues of power, accountability, and transparency in philanthropy based on the article, “Foundations: Fleas or Elephants?” written by participant Pam David, executive director of the Walter and Elise Haas Fund, and published in the nonprofit online magazine [Blue Avocado](#). We explored questions such as: “To what extent are foundations risk-averse, and why? How is innovation encouraged on the business side, but not as much in philanthropy and the nonprofit sector? What is preventing us from setting realistic expectations and measures of success in relation to the enormity of our societal issues?” Many participants felt that funders commonly impose unrealistic timeframes to address these issues. They acknowledged that it only compounds the problem when foundations and nonprofits do not work more closely with government to leverage public resources to achieve long-term, systemic impact.

We also reflected on various place-based, community change initiatives and ways they have failed to achieve intended goals. Many expressed the need for funders to develop a deeper understanding of the enormous complexity in communities, and the importance of partnering as peers with community leaders in executing effective and sustainable change strategies. A question posed was: “What is the leadership role of philanthropy if it is not driving the change in

community?” While answers to this question and others were left largely unanswered, it was important, if not refreshing, to find common understanding among both funders and practitioners about the structural and institutional challenges we face in our work. It was rare to engage in such deep, candid discussion with a small group in a format not commonly found at conferences and other venues.

Another issue explored was that of our own leadership. Each member of the group was asked to consider: “As a leader, what am I leading toward?” Early on in the Labs, Leslie Medine, executive director of On the Move, a nonprofit committed to the next generation of public sector leaders, shared her realization of not being able to reach the “promised land” in her lifetime – a dream of community change to which she has devoted her entire career. She reflected that this realization was becoming increasingly apparent with signs of a deepening economic recession and declining resources for public education. By the end of the dialogue series, Leslie expressed resolve at finding fulfillment by supporting younger leaders and their visions for their future. She said:

It’s about movements. I am helping other leaders fulfill their dreams. One outcome of this series is my renewed focus on how to apply my leadership now, and greater clarity about how I consider myself as a leader. Without the Conversation Labs, where would I have found time to reflect? The experience also helped me listen to other people talk about their own leadership. I believe strongly in the collective wisdom. There is something to be said for people to bear witness to one another’s deepest fears, concerns, commitments and life purpose. The learning that took place for me is in many ways much more powerful than anything I’ve done one-on-one.

## Challenges of the Labs

Despite the success of the Labs, we faced key challenges. Hugh, a veteran facilitator, still found it

challenging to work with a group of powerful people and opinionated professionals with a variety of belief systems about leadership. “I felt pressure to sufficiently foster relationships between the members so that honest dialogue could happen,” said Hugh. “I also had responsibility to move the group into deep discussions about issues of power, privilege, systems that produce disparate outcomes, and their role as leaders for change. Even though I fully believed in the process the organizers and I designed, each three-hour session came with uncertainty as to how people would respond. I was leading people into the unknown, and had to continuously adapt to the environment – exciting, but also challenging and uncomfortable.”

John Esterle, executive director of The Whitman Institute, observed, “Because I’m comfortable with an unstructured conversation sparked by people’s individual check-ins, I can too easily assume others are comfortable with that format as well. The Labs reminded me to question that assumption, recognizing that there is a continuum in terms of how much content and structure people like to see in a dialogue. That tension surfaced at different times, but I think we worked creatively within it.”

Second, those participants who felt frustrated at one point or another might have been reluctant to acknowledge that feeling because of the prevailing affirmative tone of the Labs. Compounding the challenge of fostering authentic conversation were the power dynamics, whether visible or not. Even though unusually deep conversations took place, we understood at the start that it would be impossible to eliminate the power dynamics given the participants’ professional roles.

A third challenge was a limitation common to any group. One funder reflected, “There were times when the conversation was frustrating. There were some topics some people felt strongly about that may not be interesting or relevant to everyone else. Despite this challenge, the group held together and people were engaged throughout.”

## Benefits from the Labs

What were the benefits of this group experiment?

While participants will likely continue to realize benefits over time, during the final conversation, our group shared common takeaways from the experience, including:

1. Deepened and provocative conversations on issues relevant to our work.
2. Increased knowledge about our field.
3. Lessons on how to create a safe and trusting group process.
4. The importance of having a comfortable and informal space for authentic sharing.
5. Strengthened relationships relevant to our work (for example, having people we can now call on for guidance and resources).
6. Shifts in thought and perspective (for example, about our own leadership).
7. Narrowing of the gap, real or perceived, between funders and practitioners (moving from a “them/us” mindset to a “we” mindset).
8. Renewed inspiration for our work and/or a sense of personal empowerment.

Some participants felt humbled and “filled up” by the experience. One person acknowledged that there are few places where such nuanced conversations take place with a sense of safety and honesty, while another expressed gratitude at finding out she is not alone in the challenges she faces in her work. As for Hugh, he said, “The discussions and personal stories fired me up, sparked new ideas, brought emotions to the surface, and inspired me to continue with the work.”

The Labs also resulted in unexpected positive outcomes. In one case, three participants had been invited to make a presentation on the topic of race and leadership in philanthropy at an upcoming conference for funders.

Having gone through the Labs together, the three suggested working together in preparing their remarks for the presentation. Had the Conversation Labs not

taken place, they probably would not have collaborated or made such a persuasive case for investing in leadership development. One of the panelists, Deborah Meehan, executive director of the Leadership Learning Community, a national convener of those who fund, provide, and study leadership programs, said, “Many times I am acutely aware of ‘grantee’ and ‘funder’ roles. It was great to experience the emerging ‘we’ that was cultivated by the time we spent together during the Labs. I think this is just the beginning for enduring work and collaborative opportunities!”

Another Labs participant, Akaya Windwood, president of the Rockwood Leadership Institute, which delivers best practices in leadership development to the nonprofit community, is preparing to convene local leadership program providers to explore ways to support their respective alumni networks. If successful, this type of collaboration could help provide additional learning opportunities for alumni. Akaya credits the Conversation Labs as an indirect but important source of contacts and referrals helping her and others gear up for this effort.

To help sustain the value of the Labs experience, all of the participants joined together over lunch six months after the dialogue series ended. We found such continued benefit that we unanimously agreed to continue convening for lunch conversations every two months indefinitely.

## Conclusion

Through the Conversation Labs, we took first steps at building deepened connections and new understandings of our own and others’ work. We did not break down the structures that inherently divide us as funders and practitioners, nor was this the expected outcome. However, we were willing to share and build relationships, showing that the experiment was successful. We encourage others to try out this model and experiment with different types of reflection and dialogue. The strengthened connections and heightened awareness we achieved are already leading to multiple benefits that promise to yield longer-term

results for years to come.

As Kelley D. Gulley, president and CEO of the National Community Development Institute, which builds capacity for social change in communities of color across the nation, said during our last gathering, “I have found these conversations to be phenomenally valuable and would welcome continuing this set of conversations. We need more spaces like these to help us become the truest of true leaders.”

### **Author and Contributor:**



**LeaderSpring™** *Cynthia Chavez* is executive director of LeaderSpring, a nonprofit organization that strengthens the leadership of executive directors of advocacy and social service agencies in the San Francisco Bay Area. Cynthia was formerly a professional staff member of the W. K. Kellogg Foundation and a Warren Weaver Fellow of the Rockefeller Foundation.

**Hugh Vasquez** is Senior Associate at the National Equity Project and a consultant to organizations working to develop transformative leaders for equity and justice. Hugh was formerly the executive director of the San Francisco Education Fund and of the Todos Institute.

## Appendix A: Key Elements to Successful Conversation Labs

1. Shared sense of purpose: Our intent was to engage in candid and real conversations where people could comfortably take risks and share openly and deeply. We hoped that these conversations would create an opportunity for a new kind of peer-based network for learning and support.
2. No specific outcomes: While there was a shared sense of purpose for coming together, not having specific outcomes gave participants freedom to delve into topics that were the most compelling, relevant and timely.
3. Group size: A group of 15 participants was considered small enough to give everyone “air time” and yet large enough to offer a rich array of perspectives and contributions to the experience.
4. Diverse participants: Adding to the richness of the experience was the diversity of funders and practitioners and the wide range of perspectives and backgrounds, including cultural ethnicity.
5. High expectations for group participation from beginning to end: Establishing continuity in member participation fostered conversations that were generative and deep. A more fluid and looser participation by the group would have made such cohesion and continuity more difficult to achieve.
6. Professional facilitator: Hugh Vasquez has extensive experience working with funders and nonprofit leaders. A highly skilled facilitator, he fostered an environment for deep and meaningful dialogue. Hugh helped spark the expression of diverse opinions, navigated and managed conflict, and highlighted how issues of power, privilege, and difference manifest in our work as funders and grantees.
7. Conducive space: The Labs took place in the offices of The Whitman Institute, a philanthropic foundation and core financial sponsor of the Conversation Labs. The office, which is located in a condominium, has living room-like space. This space was a key factor at increasing people’s comfort and fostering a willingness to share openly.
8. Use of personal storytelling: Sharing personal stories helped promote deepened understanding.
9. Desire to share confidentially and within group agreements: Establishing group agreements at the outset, especially a commitment to confidentiality, was critical to fostering candor and trust.
10. Agenda shaped by participants: At the beginning of each session the group prioritized topics to be discussed. This allowed current and perhaps unforeseen issues of the day to emerge. Members were invited to lead on a topic of interest, and the facilitator was prepared to provide support as needed.

## Appendix B: Participants in the Conversation Labs

### Program Practitioners

Jeanne Bell, CompassPoint Nonprofit Services  
Cynthia Chavez, LeaderSpring\*  
Kelley D. Gulley, National Community Development Institute  
Leslie Medine, On the Move  
Deborah Meehan, Leadership Learning Community  
Akaya Windwood, Rockwood Leadership Institute

### Funders

Pam David, Walter and Elise Haas Fund  
John Esterle, The Whitman Institute\*  
Stacie Ma’a, Wallace Alexander Gerbode Foundation  
Lise Maisano, S. H. Cowell Foundation\*  
Bob Uyeki, Y & H Soda Foundation  
Anne Vally, James Irvine Foundation  
Linda Wood, Evelyn and Walter Haas, Jr. Fund

\*Conversation Lab Organizers