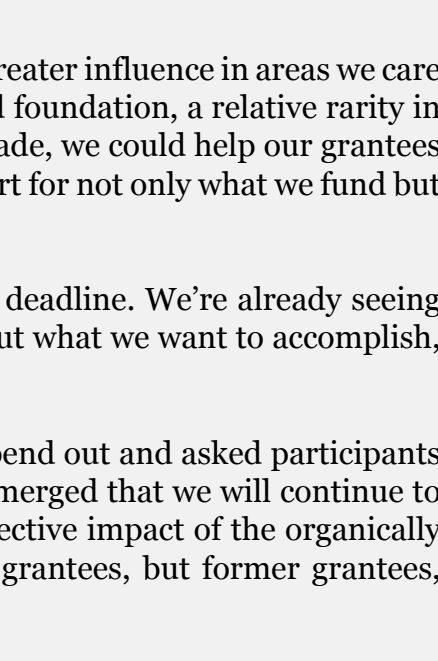


Summer Newsletter

by John Esterle

Some of you may remember that I had mentioned in our Spring 2011 newsletter that the TWI board had raised the prospect of setting a horizon date for the foundation. Now, a year later, I can report our decision: The Whitman Institute will spend out in 2022.



Last year, TWI found itself at a crossroads. As a small foundation with modest assets, we realized that we could not sustain our level of giving indefinitely (consistently above the legal minimum foundation payout of 5% of assets). At the same time, we could not justify reducing our grants budget at a time when resources were so scarce and our grantees were doing such important work. We had to make a decision: we could either stretch our resources by cutting back to the 5 percent payout or we could sustain our higher payout rate, possibly even raising grants, over a shorter time.

The board saw the option to spend out as an opportunity to exercise greater influence in areas we care about. TWI is unusual in that it identifies itself as a process-oriented foundation, a relative rarity in the foundation world. By concentrating our efforts over the next decade, we could help our grantees move their work forward while building foundation and donor support for not only what we fund but how we fund.

As many of us know, nothing concentrates the mind like a looming deadline. We're already seeing that having an end date gives a new immediacy to how we think about what we want to accomplish, what stories we will create, and what kind of legacy we leave behind.

At our TWI retreat this past March we announced our decision to spend out and asked participants to help us think about the next decade. One question in particular emerged that we will continue to explore in the year(s) ahead. How can we best tap the potential collective impact of the organically growing TWI network – a network that includes not only current grantees, but former grantees, allied funders, and other kindred spirits?

I can't close without saying more about the retreat. It was such a high for me and I think for all the participants. Before the retreat, we had some concerns about whether such a big group—we were 71 all together—could achieve the same level of trust and intimacy as in our three previous retreats. I'm happy to report that the retreat exceeded our expectations in encouraging open-hearted conversations and developing connections among grantees as colleagues to whom they can turn for support and guidance. We've included some pictures from the retreat in this newsletter, and you can read more about it in Pia Infante's blog.

For me, the retreat was a real milestone. Looking out at the amazing and talented people who had come together that weekend, I was struck by how far we had come in developing a genuine TWI community. Ten years ago I could not have imagined that TWI would be where it is today. And probably 10 years from now, when TWI closes its doors, I will look back on today and marvel at all that the TWI community had accomplished in the past decade. We could not ask for better colleagues and friends to help us realize that dream.



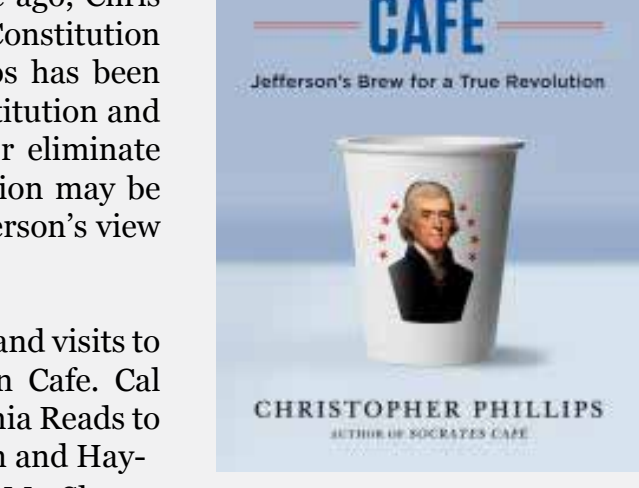
The Whitman Institute Retreat 2012
We are still inspired and grateful for the experience of being "with" many in our network this past March. Read about this year's retreat at <http://thewhitmaninstituteblog.blogspot.com/2012/03/whitman-institute-retreat-2012.html>, and check out pictures from the retreat at <http://www.flickr.com/photos/piainfante/sets/>

Searching for Democracy

by Deanne Stone

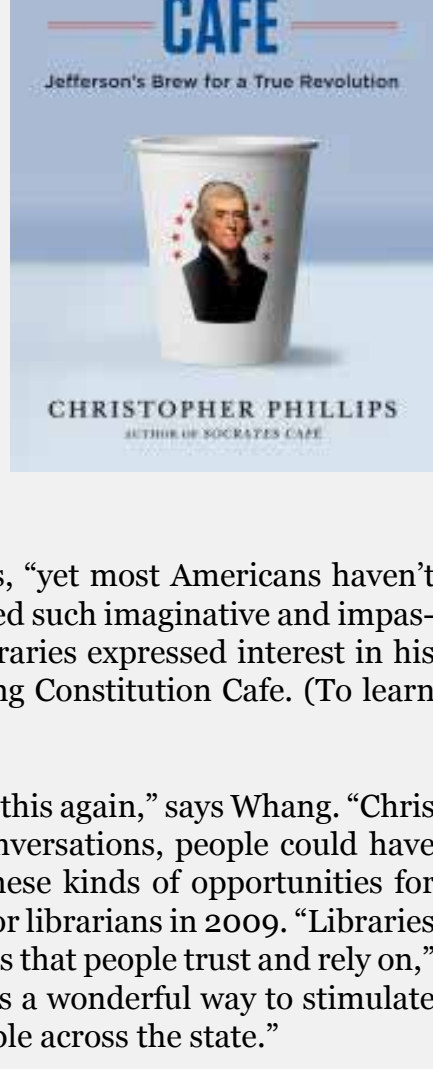
This spring Cal Humanities launched its first theme-based initiative, Searching for Democracy, an ambitious project that invites ordinary citizens from across California to explore the meaning of democracy today. Timed to coincide with the 2012 elections, the initiative runs from March to November.

The centerpiece of Searching for Democracy is California Reads. Two years ago Cal Humanities, formerly California Council for the Humanities, asked the public to submit titles of books that would stimulate conversations about democracy. Cal Humanities, with the help of a panel of scholars and librarians from across the state, winnowed the 300 recommendations down to a slate of five books: The Penguin Guide to the U.S. Constitution, Farewell to Manzanar by Jeanne Wakatsuki Houston and James D. Houston, It Can't Happen Here by Sinclair Lewis, A Paradise Built in Hell by Rebecca Solnit, and Lost City Radio by Daniel Alarcón.



"We thought, along with classic and contemporary works of literature, it was important to have a foundational document like the Constitution," says Vanessa Whang, director of programs.

To encourage community people to join in the discussions, Cal Humanities funded 52 grants to libraries across California to select any or all of the books to use in their programs. Libraries could also use some of the grant money to invite authors and scholars to facilitate discussion of the books. "California is a huge, and we knew it would not be possible for the authors to travel to all parts of the state," says Whang, "so we produced video interviews to post on our Web site for anyone to be able to see and use." The public can watch long and short forms of the interviews at www.calhumanities.org.



Cal Humanities suspected that the Constitution might be the most challenging reading on the list. In a discussion with Ralph Lewin, the president and CEO of Cal Humanities, John Esterle recommended a former TWI grantee guaranteed to bring the discussions alive. Since starting the Socrates Cafe about a decade ago, Chris Phillips has written five books, including the timely Constitution Cafe: Jefferson's Brew for a True Revolution. Phillips has been traveling the country leading discussions on the Constitution and asking people to consider what they would add to or eliminate from the Constitution. Tampering with the Constitution may be heresy in some circles, but it was fundamental to Jefferson's view of the Constitution as a living document.

Cal Humanities underwrote Phillips' trip to California and visits to five libraries interested in sponsoring a Constitution Cafe. Cal Humanities is especially interested in bringing California Reads to rural and underserved areas, so along with Long Beach and Hayward, Phillips visited libraries in Lodi, Placerville, and Mt. Shasta.

"The Constitution permeates every aspect of our lives," says Phillips, "yet most Americans haven't read it. Asking people what, if anything, they would change has spurred such imaginative and impassioned conversations." Phillips' discussions were so popular that libraries expressed interest in his returning in the fall and the Mt. Shasta library is creating an ongoing Constitution Cafe. (To learn more about Phillips' work, go to www.constitutioncafe.org)

"After each of Chris's programs, people would ask when they could do this again," says Whang. "Chris lives on the East Coast, but if we had librarians who could lead conversations, people could have these kinds of interactions on a regular basis." It was because of these kinds of opportunities for dialogue that Cal Humanities piloted a facilitation training program for librarians in 2009. "Libraries are in just about every corner of California, and they are familiar places that people trust and rely on," says Whang. "Having librarians skilled in civic dialogue facilitation is a wonderful way to stimulate meaningful conversations about topics that are of importance to people across the state."

The final numbers won't be in until the end of this year, but more than 500 California Reads events are rolling out in 2012, building up to what Cal Humanities hopes may be the most ambitious state-wide look at the meaning of democracy.

Close to 300 people turned out at the Sunnyvale library's discussion of Farewell to Manzanar and more than 100 for a discussion of the Constitution at the Reagan Library.

Cal Humanities also wanted to make sure that the Searching for Democracy initiative involved schools as well as the general public. In addition to developing a set of discussion guides for each book with its partner, the California Center for the Book, it commissioned standards-aligned curriculum guides for teachers, created by the UC Davis-based California History-Social Science Project.

"There was a lot of planning and partnerships to make this initiative a reality," says Whang. "We planted the seeds and now we're seeing the results." It's exciting to see how the libraries have found so many creative ways to engage people, everything from community read alouds to civic dialogues to the sharing of personal experiences related to the books.

California Reads is the biggest piece of Searching for Democracy. Running simultaneously are Public Conversations with Zocalo Public Square, the Teaching Democracy webinars for educators, democracy-themed Community Stories events, and the traveling exhibit, "Wherever There's A Fight," about unsung California heroes. (Check www.calhum.org for more information about these programs.)

Making Just One Change

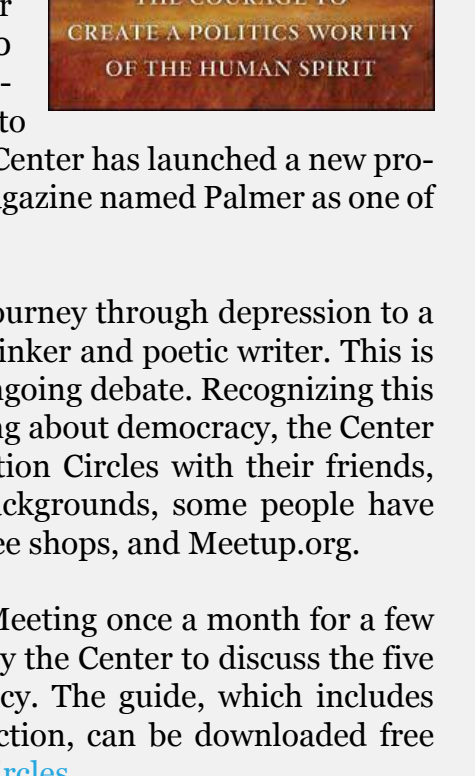
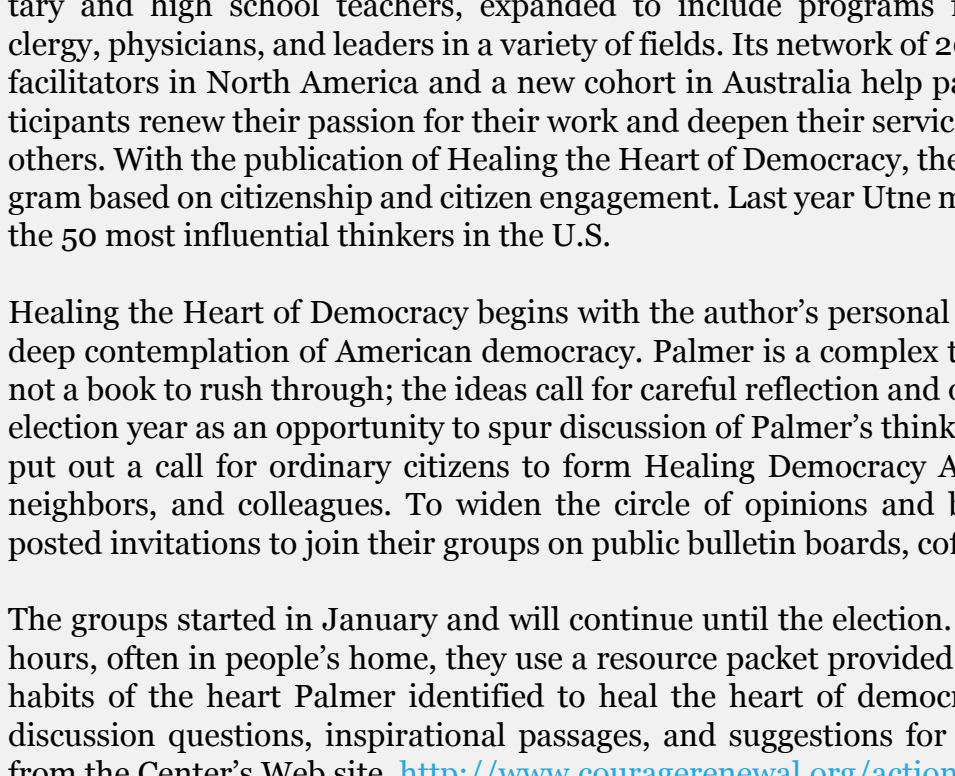
by Deanne Stone

This spring Cal Humanities launched its first theme-based initiative, Searching for Democracy, an When the TWI Newsletter checked in with Dan Rothstein and Luz Santana two years ago, they were just preparing to write a book introducing classroom teachers to their revolutionary, yet simple, technique for encouraging students' curiosity and creativity. Rothstein and Santana are codirectors of The Right Question Institute in Cambridge, MASS. For more than 20 years, they have worked with nonprofit organizations serving minorities and individuals with low incomes. Many of these individuals had difficulty getting the information they needed from people, such as medical practitioners, social workers, and their children's teachers. Some felt intimidated by people in positions of authority, but most were uncertain of just what questions to ask.

"The QFT provides students with important learning and thinking skills, and a good process for tackling the unknown and the complicated. When those students are given the chance to reflect and to recognize that they have these skills and processes, they develop confidence in themselves as collaborators, thinkers, and problem-solvers."

Joan S. Soble, Teacher, Cambridge MA

Rothstein and Santana developed a method they called the Question Formulation Technique™, a process in which individuals learn to generate, rework, and prioritize questions until they hit on the questions that would provide the information needed to take the next step. Learning a new approach to asking questions takes time, but with practice, most of the clients began using the Question Formulation Technique in their daily lives—and with good results.



Asking the right questions led to their making better decisions, feeling more self-confident, and even motivating some to become engaged in civic actions in their local communities. Most important, these individuals acquired the tools to advocate for themselves.

Encouraged by their work with social service agencies, Rothstein and Santana shared their technique with classroom teachers. The technique requires teachers to make the revolutionary shift from bearing all the responsibility for asking questions to directing students to ask and critically assess their own questions. For more than a decade, the authors have been training teachers on how to use the Question Formulation Technique and reporting on their progress at the annual conference of the Coalition of Essential Schools. The editors at Harvard Education Press, impressed by Rothstein and Santana's work, invited them to write a book for classroom teachers on how to integrate the technique into their teaching. In the fall of 2011, Harvard Education Press published Make Just One Change, Teach Students to Ask Their Own Questions.

The book has generated a lot of excitement in educational circles, especially after the widely read Harvard Education Letter (www.hepg.org/hel/article/507) published an article by Rothstein and Santana about the Question-Formulation Technique (Teaching Students to Ask Their Own Questions, September/October 2011). Their book got more attention as several venues at the Harvard Graduate School of Education helped build a case for using the Question-Formulation Technique. A podcast of the interview, for example, was posted on the Harvard Graduate School website. The podcasts, recognized for the biggest names in the education field, generated more interest from educators and researchers for Rothstein and Santana's work. The Civic and Moral Education Initiative at Harvard also sponsored a Colloquium on the work of the Right Question Institute. The authors don't have any figures on how many books have been sold, but they noted that on many days it has been the number one most viewed book on Harvard Education Press's list.



"We got a great reception from elementary, middle school and high school teachers nationwide and around the world," says Santana. "The article listed all the steps of the process, but teachers need the book to teach students how to use it." In fact, a group of teachers from Sydney, Australia participated in a skype-based training session in May for additional instruction in using the Question-Formulation Technique. And this July, the Right Question Institute is holding two-day programs for teachers already using the technique to share their experiences on how to get the most out of the process.

"People talk about the importance of asking the right questions," says Santana, "but few schools teach the skill and, if they do, their strategies are too complex. Our book describes an easy way to teach it and integrate it into the curriculum, whether it's literature, the social sciences or science."

"Before we introduced the Question Formulation Technique," says Rothstein, "teachers didn't have an effective way to teach the skill. Now that it's out there, teachers are astonished by its simplicity and power."

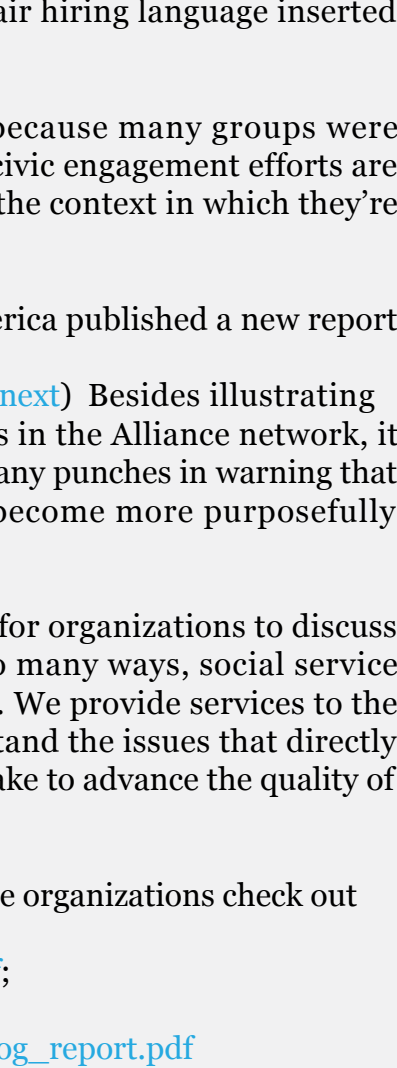
What accounts for its wide appeal is the ease of adapting the technique to the different age groups and levels? Besides training elementary, middle and high school teachers in the technique, the authors taught it to graduate students in the Law School and School of Education at Harvard University, demonstrating that even the most sophisticated students could use the Question Formulation Technique to improve their skills in asking questions and strategizing on how to use them.

To learn more about the Right Question Institute, please check: www.rightquestion.org
Make Just One Change- <http://rightquestion.org/make-just-one-change/>

Healing Democracy Action Circles

by Deanne Stone

Parker Palmer calls the politics of our time, "the politics of the broken-hearted." He spoke those words before the 2012 presidential race got underway, but surely they will have more resonance as the war between the parties heats up. From now until November, we will be inundated with vicious attack ads, misleading information, and endless appeals for money. What sensible person wouldn't be broken-hearted observing what passes for political discourse in this country?



Palmer has spent a lifetime contemplating what has gone wrong in our country and how to make it right. After six years of thinking and writing about American democracy, last year he published his ninth book, *Healing the Heart of Democracy: The Courage to Create a Politics Worthy of the Human Spirit*. The arresting title encapsulates the author's conviction that in a healthy democracy, citizenship reflection and collective action.

Parker Palmer is a teacher, thinker, and social-change activist. Fifteen years ago, he founded the Center for Courage and Renewal to create programs and disseminate resources based on his work and writing. The center, which began by training facilitators to work with elementary and high school teachers, expanded to include programs for clergy, physicians, and leaders in a variety of fields. Its network of 200 facilitators in North America and a new cohort in Australia help participants renew their passion for their work and deepen their service to others. With the publication of *Healing the Heart of Democracy*, the Center has launched a new program based on citizenship and citizen engagement. Last year Utne magazine named Palmer as one of the 50 most influential thinkers in the U.S.

Healing the Heart of Democracy begins with the author's personal journey through depression to a deep contemplation of American democracy. Palmer is a complex thinker and poetic writer. This is not a book to rush through; the ideas call for careful reflection and ongoing debate. Recognizing this election year as an opportunity to spur discussion of Palmer's thinking about democracy, the Center put out a call for ordinary citizens to form Healing Democracy Action Circles with their friends, neighbors, and colleagues. To widen the circle of opinions and backgrounds, some people have posted invitations to join their groups on public bulletin boards, coffee shops, and Meetup.org.

The groups started in January and will continue until the election. Meeting once a month for a few hours, often in people's home, they use a resource packet provided by the Center to discuss the five habits of the heart Palmer identified to heal the heart of democracy. The guide, which includes discussion questions, inspirational passages, and suggestions for action, can be downloaded free from the Center's Web site, <http://www.courage renewal.org/actioncircles>. The Center has also added an interactive courage guide that allows participants to read and reflect on the book with the author and videos of Palmer talking about each chapter. There is still time for interested individuals to join ongoing groups in their areas or start their own groups.

The Five Habits of the Heart

We must understand that we are all in this together.

We must develop an appreciation of the value of "otherness."

We must cultivate the ability to hold tension in life-giving ways.

We must generate a sense of personal voice and agency.

We must strengthen our capacity to create community.

"The Circles are experiments in citizenship," says Terry Chadsey, the executive director of the Center for Renewal and Courage. "People may disagree about any number of things, but we all want our politics to reflect the dignity of the human spirit."

The Center doesn't want a tally of how many groups have formed because it didn't want to burden participants by asking them to write reports. But more than 800 people have downloaded the packet and many have shared their stories with the Center. Some of the most vibrant circles have been organized by the Unitarian church, an audience whose ideas already resonated with Palmer's work. Chadsey acknowledges the difficulties of bringing people into the circles from different political perspectives.

"It's a challenge getting beyond the folks who are normally part of this conversation, especially in the current political climate," says Chadsey. "I haven't heard of any groups that have a broad political spectrum, but that doesn't mean they're not happening."

Jumping into a debate with people of opposing views may not be the best starting point to discussing the book. It's possible that after cultivating Palmer's five habits of the heart, participants will emerge from the circles with a better understanding of their own beliefs, more confident to discuss them with people holding different views, and more prepared to act on the five habits in their daily lives.

"People are quick to blame politicians for all that's wrong in our country," says Chadsey. "The solution to what fills us with angst lies within us, not in the hands of others. In the circles, participants have a chance to reflect on their own relationship to citizenship. What we hope folks come away with is a sense of agency, a vision of themselves as actors in the political world."

Mobilizing Social Service Organizations for Action

by Deanne Stone

Social service organizations do a terrific job of providing services to clients, but the provider/client model has its limits. There is just so much that social service organizations can accomplish on their own, especially in the current climate of political polarization and reduced budgets. If they are going to effect far-reaching changes, they have to move beyond just providing services to educating their clients on how to advocate for themselves, their families, and their communities.

Why have so few social service agencies engaged in public policy debates at the local, state, and federal levels? That was a question raised by a group of independent researchers about a decade ago and taken up by the Alliance for Children and Families. The researchers found that what held social service organizations back was not lack of interest but lack of resources. They had neither the training nor the money to educate their staff and clients in civic engagement. And they certainly didn't have discretionary funds for experiments.

The Alliance for Children and Families is a membership association of private, nonprofit organizations in North America serving children and families. Through its services, advocacy and conferences, it works to strengthen the capacity of its member organizations to better serve their constituencies. Helping them implement civic engagement efforts seemed like a natural fit.

Seven years ago, the Alliance hired Linda Nyugen as its director of civic engagement. Her first effort was coordinating a project to provide six Alliance members with the tools and resources needed for effective civic engagement. The promising results were published in a report, *New Voices at the Civic Table* http://www.alliance1.org/sites/default/files/new_voices.pdf

"Our project showed that with the right infrastructure, training and support, social service organizations could be successful in civic engagement and influence public policy," says Nyugen. "A number of foundations were impressed by the results and offered to fund the program for another three years."

The funding allowed the Alliance to award select members \$10,000 grants to implement local civic engagement initiatives. Some used it to hold trainings on advocacy and how to pass legislation at the state level, and others funded dialogues. Still others paid for support staff time. Civic engagement work is often concentrated in the hands of one staff member; the grants allowed some organizations to choose to pay staff to take on additional responsibilities of leadership.

"One of the most important lessons we learned from the project was that organizations approach civic engagement differently," says Nyugen. "Community context is also really important in figuring out what civic engagement efforts make sense in different places."

Next, the Alliance created different levels of grants, awarding \$6,000 grants to organizations just getting started on civic engagement and \$35,000 grants to larger and more sophisticated member organizations. In one case, a group of high school students in a small town in Maine organized and led an agency to remove alcohol from stores located near their school. On a larger scale, an established agency in Minneapolis led a coalition to push for fair hiring practices for women and minorities. They mobilized community residents and succeeded in getting fair hiring language inserted into rules for state contracts.

"We can't take all the credit for these successes," says Nyugen, "because many groups were involved. What's important to recognize is that both small and large civic engagement efforts are significant, and that they should be judged on what makes sense in the context in which they're working."

This spring the Alliance and the United Neighborhood Centers of America published a new report on civic engagement, *The Next Chapter*. http://www.alliance1.org/sites/default/files/pdf_upload/report/12-009_ce_next Besides illustrating the range of civic engagement activities undertaken by organizations in the Alliance network, it also took a hard look at the field and its future. The authors didn't pull any punches in warning that social service organizations risk being marginalized if they don't become more purposefully involved in long-term civic engagement strategies.

"The Next Chapter report is a call to action and a good starting point for organizations to discuss how they can get involved in civic engagement," says Nyugen. "In so many ways, social service organizations are the bridge between the government and the people. We provide services to the most vulnerable people, but we have to do more to help them understand the issues that directly affect them, their families, and neighbors along with actions they can take to advance the quality of life in their communities."

To read more about efforts to promote civic engagement in social service organizations check out the following publications: *Constituent Voice* at http://beta.alliance1.org/sites/default/files/constituency_voice.pdf; *Civic Engagement Measurement System* at http://alliance1.org/sites/default/files/pdf_upload/report/11-149_kellog_report.pdf