



WORKING WIKILY 2.0

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Social Change with a Network Mindset

It's probably safe to say by now that we all know about web 2.0. We've read a blog. We've looked something up on Wikipedia. We've created a Facebook profile and started collecting friends. We may have even "tweeted." The tools are now accessible to the point where, for most of us, they've become integrated into our everyday lives.

But the tools are only the beginning of the story. The deeper news is actually about the *networks* behind the tools, and how these networks are fundamentally changing the way we live and work. In other words, it's not the wiki; it's how wikis and other social media tools are engendering a new, networked mindset—a way of **working wikily**—that is characterized by principles of openness, transparency, decentralized decision-making, and distributed action.

By Diana Scarce, Gabriel Kasper, and Heather McLeod Grant

www.workingwikily.net

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The emerging mindset is producing new approaches for connecting people and organizing effort. It's what helped Barack Obama couple grassroots organizing principles with social networking tools, email advocacy, and text messaging to successfully mobilize and empower more than 13 million supporters¹ and raise nearly three quarters of a billion dollars² during his 2008 presidential campaign. And it has helped Procter and Gamble become the partner of choice for bringing new consumer products to market through its "Connect and Develop" initiative, which revitalized the organization's stagnating internal R&D function by tapping into a broad network of external collaborators for new ideas.³

Social sector leaders are also embracing the network mindset and using network structures, strategies, and tools to organize new forms of political expression, social action, and community building. The Save Darfur Coalition, for example, is coordinating efforts across college campuses to raise public awareness and apply political pressure to stop the genocide in the Sudan. Habitat for Humanity Egypt is using a network of partnerships with existing local organizations to increase its average housing production rate from 200 houses per year to more than 1,000 houses annually.⁴ And the Boston Green and Healthy Building Network (an effort initiated by the Barr Foundation) is employing social network maps to help local public health and environmental advocates coordinate their efforts to lobby city officials for changes in building standards.⁵

Networks are changing philanthropy too. Funders like Global Greengrants are working with networks of advisors around the world to distribute control over grants decision-making to knowledgeable local experts and activists. Philanthropic matchmaker Kiva is using online tools and a web of international microfinance partners to help individuals make more than \$1 million in loans to developing entrepreneurs every 10 days, largely in small, \$25 increments.⁶ Experiments like the Case Foundation's Make It Your Own Awards and Ashoka's Changemakers initiative are using online platforms to engage ordinary citizens in determining how foundation resources get distributed. And funders like the Barr Foundation, the Annie E. Casey Foundation, and The California Endowment are working to strengthen ties within local networks of people and organizations as an avenue for building healthier communities.

These examples of *working wikily* are still the exception, rather than the rule. But they're growing more widespread, and as the tools and approaches enter further into mainstream consciousness, networks increasingly represent an exciting opportunity for helping social change organizations expand the leverage and impact of their efforts.

WHY VERSION 2.0?

This piece, written in March 2009, was based on our original working paper, "Working Wikily: How Networks are changing Social Change," which was drafted in the Spring of 2008.

Over the past year, the use of social media tools has become increasingly mainstream, interest in both networks and leading with a network mindset has mushroomed (driven in part by the success of the 2008 Obama campaign), and the tools themselves have continued to mature. At the same time, the Monitor Institute's knowledge of networks has deepened as we continued the work of the Philanthropy and Networks Exploration, our partnership with the David and Lucile Packard Foundation (see page 22). This second version of "Working Wikily" is an effort to update and share our learning to date.

If you haven't read the first version of the piece, we encourage you to read this one instead. If you've already read the earlier paper, we hope that this iteration can take you beyond the basic description of networks and social media tools to provide you with some helpful advice on how to start working wikily.

What's Driving the Changes?

Networks aren't new. They are as old as human society. We are all part of networks: our families, our schools, our workplaces, our social circles. For many social activists, "networks" and "organizing" are nearly synonymous and have long been core tools of their trade. Gandhi could not have catalyzed Indian independence if it were not for a rapidly formed network of disenfranchised salt workers. Chico Mendes could not have achieved his successes in preserving the Brazilian rainforest if it were not for a network of indigenous leaders, rubber tappers, international NGOs, and enlightened family farmers. Alcoholics Anonymous would not have evolved from two guys in Ohio helping each other stop drinking to two million members around the world today without a network model of local support groups.⁷

What's different now, according to Clay Shirky, the author of *Here Comes Everybody: The Power of Organizing Without Organizations*, is that "we are living in the Golden Age of network theory, where sociology, math, computer science and software engineering are all combining to allow the average user to visualize, understand, and most importantly, rely on the social and business networks that are part of their lives."⁸

At the same time, a range of new tools and technologies—from free conference calls and emails to blogs, wikis, tags, texts, and tweets—are changing the way we communicate and connect. The technologies go by many different names: web 2.0, social software, social technology, social media. Regardless of what they are called, the tools are characterized by several key features: they are "social," in the sense that they facilitate interaction between people; they allow "many-to-many" connections, between and among virtually any number of people, however small or large; and they allow both simultaneous and asynchronous interaction—people can communicate in real time, or over long periods.

These features now allow more people to easily engage and connect, irrespective of geographic distance; they provide us with the opportunity to access a greater diversity of perspectives and expertise; and they can facilitate accelerated learning and on-demand access to information—all while reducing the costs of participation and coordination. At the same time, new tools for social network analysis and mapping now allow us to see and understand networks of relationships that were previously invisible.

Yet the most important shift goes beyond the technologies themselves. The real transformation is in the way that people are using the tools and fundamentally changing how they think, form groups, and do their work. As Shirky explains, "The invention of tools that facilitate [network] formation is less like ordinary technological change, and more like an event, something that has already happened. As a result, the important questions aren't about *whether* these tools will spread, or re-shape society, but rather *how* they will do so."⁹



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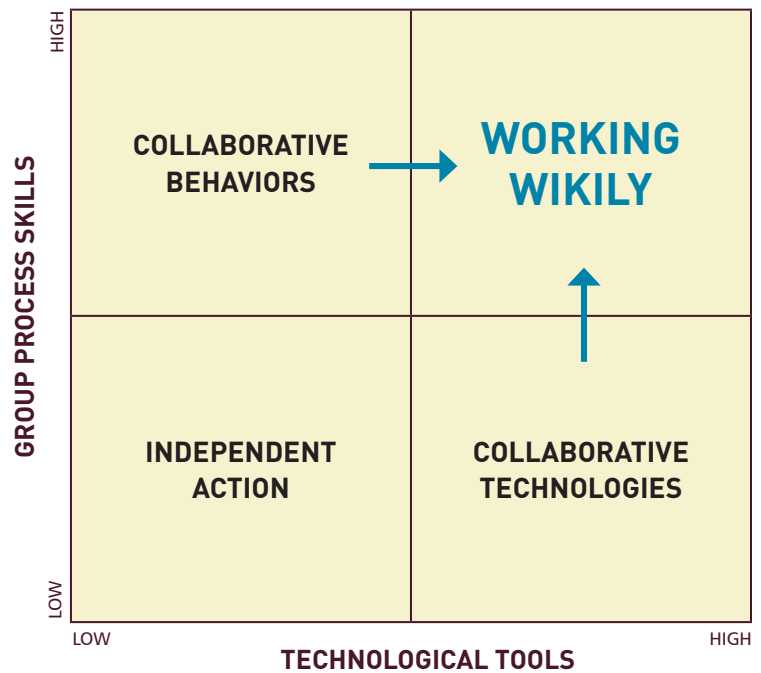
Early pioneers of working wikily are merging well-tested knowledge about community organizing and effective collaboration with emerging social media technologies in order to allow us to do old things in new ways, and to try new things that weren't possible before (see the matrix to the right). The real question now is how these behaviors move from the periphery to the mainstream—from novel experiments to commonplace ways of getting work done. What does it take to adopt and spread a new mindset?

It is a challenge we've faced with revolutionary innovations throughout human history. The printing press, for example, was invented in the mid-fifteenth century, but its full potential for changing productivity wasn't

reached for many decades. Bibles were being printed using the new press, but monks were still producing all of the pictures by hand, so they could only produce as many bibles as monks could create pictures. Thinking shifted, at a certain point, and they came up with the idea of using plates to reproduce illustrations more quickly. But it was only after the "printed" reality was internalized that someone was able to develop this new way of quickly creating illustrations using a press, which sparked a radical change in production. It turns out that there is often a long period during which new technologies are used, but their full potential isn't realized, because people are still thinking about things in the old ways. Only once the tools become a routine part of people's lives do they have the potential to be truly transformational.

As we begin to take for granted the new "networked" reality, it is changing our core assumptions about the way we work. Using the new mindset and technologies, people can now:

- Self-organize without centralized planning and infrastructure
- Spread ideas and form groups more quickly than ever before as the new tools allow them to connect with others instantaneously and virally
- Overcome barriers to collaboration to find others who share specific passions and to take on larger projects that would have previously been unthinkable
- Access knowledge, leadership, and expertise in places that were once beyond their reach
- Share information quickly and with little effort, making more resources available and enabling people to easily build on the work of others
- Come together and disassemble as needed to achieve goals



The spread of these new assumptions doesn't mean that the old ways of doing things will disappear. There will always be a place for organizations, independent action, individual experts, and hierarchical structures, and they will undoubtedly continue to produce many critical and impressive feats. In fact, most "network work" in the coming years will likely take place within organizational contexts. But as people continue to embrace the potential of networks, the traditional organizational models will increasingly become one approach, among many, for organizing work and accomplishing goals.

Why Do Networks Matter to Social Change?

The new mindset and tools are allowing us to re-imagine our social activities—like organizing people, learning, generating ideas, and sharing information and knowledge—but with the potential to do them bigger, better, faster, and cheaper than ever before.

Exploiting these potential benefits is becoming even more critical as nonprofits face an increasingly challenging operating environment. The number of nonprofits grew by more than 27% in the decade between 1995 and 2005,¹⁰ and the increasingly crowded marketplace makes competition fierce and fundraising more difficult and costly—especially in an economic downturn where funders have fewer resources to give. At the same time, the vast majority of nonprofits are extremely small, with annual budgets of less than \$1 million.¹¹ In an environment where growing social impact is extremely difficult to achieve, networks are becoming one answer for increasing scale, efficiency, coordination, and impact.

More specifically, networks can help social change leaders understand systems and build community, develop and share knowledge, aggregate and coordinate resources and services, and scale.

UNDERSTANDING SYSTEMS AND BUILDING COMMUNITY

The development of affordable and user-friendly tools for data capture and social network analysis now allows us to visualize the previously invisible web of relationships between people and organizations. Social network maps can help to shift our mental models; seeing social networks helps us to understand our connections to others in new ways and to take action based on that knowledge. The maps allow us to identify leverage points for helping a network produce better outcomes, to build a sense of connection and shared purpose across a network, and to assess changes in relationships and collaboration over time.

An example like the Boston Green and Healthy Building Network illustrates the power of social network mapping in action. The Boston-based Barr Foundation had spent several years funding two sets of local organizations that advocated for changes in building codes and standards: public health organizations that saw



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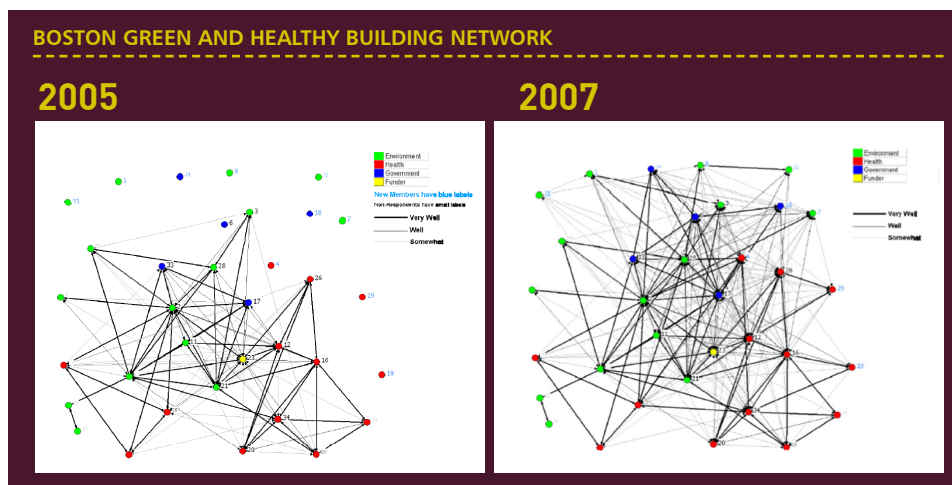
unhealthy buildings as a root cause of many illnesses, and environmental groups that were focused on the energy efficiency and ecological impact of buildings. In 2005, a senior program officer at Barr recognized that while the “causes” of the two sets of organizations were different, the groups shared a common goal of setting higher performance standards for buildings, and they often approached the same government officials with similar requests. So Barr brought together the various parties in April 2005 to explore whether they could align their efforts, share information, and develop a more unified message for policymakers. Using information collected at the gathering, the foundation developed a real-time social network map of the people in the room. The map clearly showed two principal clusters of dots, one representing people in health organizations and the other primarily people in environmental organizations; it also showed that the groups were not well connected. Seeing the map of their fragmented network, the groups agreed to begin meeting together and eventually formed the Boston Green and Healthy Building Network. This network has increased connections and collaboration across the different groups and has improved access to, and relationships with, many key policy-makers in the city.¹²



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DEVELOPING AND SHARING KNOWLEDGE

New tools for collaboration are also significantly changing the way that people are able to work together to build collective knowledge. The Full Frame Initiative in Cambridge, Massachusetts, for example, is creating a national learning network to share, spread, and deepen knowledge of best practices among social service agencies supporting marginalized people and communities. The agencies tend to be deeply rooted in the context of their communities, often making it difficult to find a shared “frame” for connecting with others working in different geographies. So the Full Frame Initiative is building bridges across agencies that share a common approach to their work, as well as connecting them to strategic



Source: “Beth Tener, Al Nierenberg, and Bruce Hoppe, “Boston Green and Healthy Building Network: A Case Study,” Barr Foundation, January 2008.”

allies from a range of fields. A central part of their collaboration is the creation of shared online and in-person spaces for these agencies and partners to connect, support one another, share their challenges and insights, and build their collective knowledge.¹³

The new tools are also facilitating the rapid sharing and co-creation of new knowledge. *New Yorker* columnist, James Surowieki, for example, chronicled the famous example of the global collaboration to find the cause of SARS. When the SARS epidemic broke out in 2003, the World Health Organization set up a network of 11 research labs around the world in a massive collaborative effort to find and analyze the cause of the disease. The labs each pursued what they believed to be promising lines of investigation, but were able to coordinate what they were learning and share data and information in real time, conferencing daily over the phone and on the web. Just a week after the project began, the team of labs had isolated a candidate virus. Within a month, the labs proved that the virus was the cause of SARS, sequenced the virus, and developed several diagnostic tests. Four months after the first outbreak outside of China, the epidemic was successfully contained, due in large part to this unprecedented international collaboration and cooperation.¹⁴

Networks also allow groups of people to aggregate the information held by individuals to create larger, collective sources of knowledge. One fun and practical

FORCES ACCELERATING THE USE OF NETWORK APPROACHES

Emerging trends such as the worldwide spread of new technologies and impending generational shifts suggest that the adoption of network tools and strategies will only accelerate as we look into the future.

Cell phones, in particular, are a key vehicle for the global spread of the new social tools as they become ubiquitous around the world. Phones can now be used to send text messages, to communicate with groups, and to connect to the internet. Mobile phones now connect 4 billion people around the globe—approximately 60 percent of the world’s population.¹⁵ The growth is especially pronounced in the developing world, where far more people have cell phones than land-lines and internet connections. In Africa, almost 90 percent of all telephone subscribers have mobile phones, and the number of cell phone subscribers is growing by more than 50

percent each year.¹⁶ In China, nearly 50 percent of the population now uses cell phones, and, in India, the rate of usage is growing by more than 90 percent a year.¹⁷ While high-bandwidth tools like MySpace are generating great excitement in technology-rich environments like the United States, the newfound ability for half of the world to use their phones to send and receive text messages has the potential to drastically change the way people interrelate *everywhere*.

Many experts believe that we are only now seeing the leading edge of change when it comes to the new social tools, and that there may be an even greater shift once today’s young people begin to enter the workforce. The “millennial” generation—young people born after 1980—represent the first generation to grow up with the internet and the reality of instant and easy access to information and people. Their younger siblings do not

even remember a time without Facebook and web 2.0.

Some 93 percent of teens in the U.S. report using the internet; 64 percent report sharing or creating content (pictures, stories, video, blogs, and web pages) online;¹⁸ and 75 percent of online teens say they have created profiles on social networking sites like Facebook or MySpace.¹⁹ As a result, they come to the table with an innate comfort with new technologies and different expectations for connectivity, sharing, and openness.

According to Roberto Cremonini of the Barr Foundation, “The next generation will intuitively understand networks and these new tools. We [older people] are trying to make sense of all of this, but it’s hard for us to leave behind our old mindsets.... Real change will come from people who have already internalized the new ways of behaving. For them, networks are natural.”

example of this type of effort can be seen at the website Safe2Pee.org, which allows individuals to enter information about the location of accessible and tolerable public bathrooms in their hometowns. The many contributions are compiled into citywide Google “mash-up” maps that offer critical, and often timely, information for those in need of a restroom. In this way, the knowledge of each individual, when aggregated, becomes part of an even more powerful base of knowledge that everyone can use.

AGGREGATING AND COORDINATING RESOURCES AND SERVICES

As the new tools lower the barriers to collaborative efforts, networks are also becoming increasingly facile at aggregating and coordinating resources and activities. The peer-to-peer giving site DonorsChoose, for instance, is pooling donations and matching them with targeted requests from schools around the country. Since its inception as a modest project to serve New York City schools in 2000, more than \$25 million has been given through the site, with almost half of that total contributed between mid 2007 and mid 2008.²⁰

In addition to aggregating money, networks are creating opportunities for new efficiencies and impact by connecting and coordinating services that were once fragmented. This is the challenge the Hawai'i Community Foundation was trying to overcome among the islands' youth development agencies when it spearheaded the Youth Matters Initiative in 2008. Twenty organizations, each deeply rooted in its local community, had been working to provide youth services in near isolation, with little awareness of, or coordination with, like-minded organizations in nearby communities and on the other islands. So the Hawai'i Community Foundation launched the initiative to build connectivity among these organizations and thereby strengthen youth development services across the state. An initial social network map of Youth Matters participants (see *Youth Matters Network Prior to First Convening* on page 9) highlights the lack of connectivity between the organizations when the initiative was launched, with each cluster representing a set of relationships surrounding a single organization. Through the network, participating organizations are beginning to coordinate their activities, and they have collaborated to articulate a set of shared goals for improving outcomes for youth in Hawai'i. It is likely that when they map their relationships again in the coming years, the picture will look considerably different.

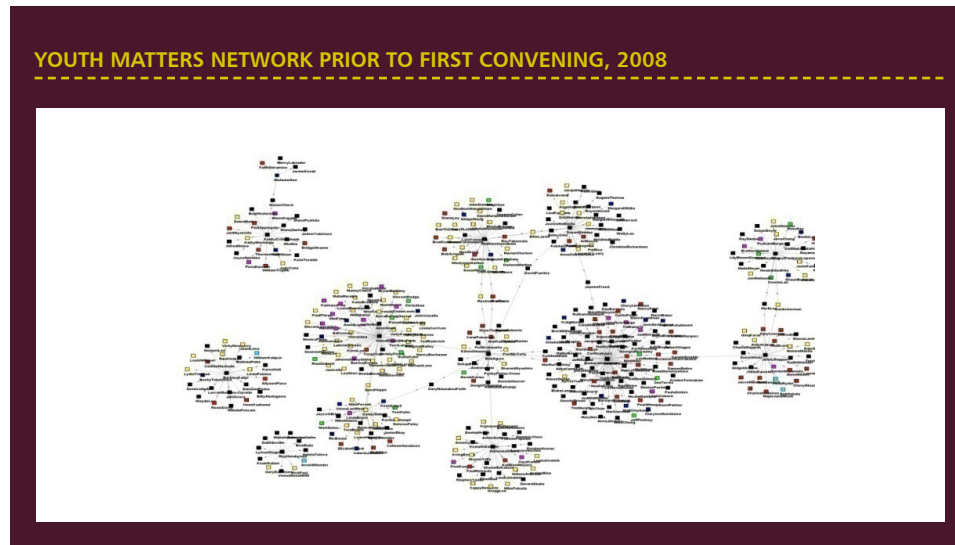


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ORGANIZING PEOPLE AND EFFORT

Networks are also proving to be a powerful tool for distributing labor, doing more without increasing staff size, and sharing the burden of large, complex endeavors. Many organizations are beginning to experiment with an approach called crowd-sourcing—the act of taking a task traditionally performed by one individual and outsourcing it to a large, undefined group of people.²¹ The notion of using distributed labor in this way has been around for more than a decade, since the Search

For Extra-Terrestrial Intelligence (SETI) project began marshalling unused capacity on personal computers to help scan for alien life. Today, the World Community Grid is using a similar “collaborative computing” approach to support large-scale



humanitarian and social research, and crowdsourcing is growing in popularity in arenas far beyond the scientific community. The online news site *Muckraker*, for example, asked its readers to parse the 3,000 emails released by the Department of Justice related to the firing of federal prosecutors in 2007. Within hours, readers were identifying questionable passages, some of which led to new story leads for the site.²²

In another promising case, the web-based company InnoCentive acts as a broker for crowdsourcing solutions to difficult research and development challenges. The organization has outsourced traditionally in-house R&D functions to create an “innovation marketplace” that connects companies and academic institutions seeking breakthroughs with a broad global network of more than 125,000 scientists, inventors, and entrepreneurs interested in developing creative solutions. A recent partnership with the Rockefeller Foundation is now allowing select non-profits to use the InnoCentive process to post problems related to addressing the needs of poor and vulnerable populations and offering rewards to innovators who solve them.

Networks are also allowing some funders to experiment with the idea of democratizing decision-making, decentralizing the authority to make grants and bringing grant decisions closer to those working on the ground and in communities. The Global Greengrants Fund, for example, makes small grants to grassroots environmental groups working around the world. To find grantees and make grant decisions, the fund uses a network of regional and global advisory boards made up of local scientists and activists, leaders of small coalitions, teachers, journalists, engineers, physicians, and international environmental leaders. These advisory boards are responsible for the grantmaking decisions in each of their

regions, leveraging local expertise and creating a system that puts grant decisions in the hands of the people closest to the action.

GETTING TO SCALE

Networks, with their ability to spread knowledge and models without the requirement of a burdensome centralized structure, are also helping social change leaders scale their impact without having to increase the size of their organizations. The grassroots religious network Voice of the Faithful (VOTF), for example, formed in response to a series of articles in the *Boston Globe* about sexual abuse scandals in the Catholic Church. In the past, a person looking to share these articles would have needed to make photocopies and hand them out or mail them to people. Instead, organizers were able to send online links to the articles, which could then be passed on easily and virally to even more people. Blogs and websites for aggregating information allowed people to spread the word and to accurately track incidences of abuse. Using these types of advances, VOTF grew exponentially from an initial meeting of just 25 people in a church in Massachusetts to a powerful, global online network of more than 25,000 members in less than a year. The new tools allowed people to organize across parish lines in a way never before possible—and to reach scale at a pace never before possible—in order to share information about the issue and coordinate the call for institutional changes in the Church.²³



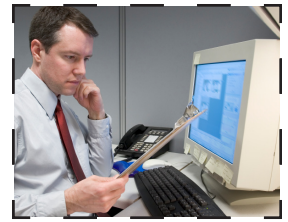
“The future is not in large organizations; the future is in the network and servicing other organizations.”
– Goéry Delacôte

Whereas VOTF was able to increase the scale of coordinated action, networks can also be used to scale ideas, models, and ways of working. In the case of the Exploratorium, a science museum in the San Francisco Bay Area that pioneered hands-on learning through interactive exhibits, the founder, Frank Oppenheimer, spread the museum’s model by encouraging others to copy it. Oppenheimer did not try to replicate the Exploratorium in a controlled way. Instead, by open sourcing his museum’s approach, he successfully catalyzed a movement of interactive science museums around the world. Today, this open source network strategy remains core to the museum’s philosophy and way of working. As the current executive director, Goéry Delacôte, has said “The future is not in large organizations; the future is in the network and servicing other organizations.”²⁴

When Are Networks *NOT* the Answer?

Even as networks and network tools are opening up a range of new and creative options for social change leaders, it also is important to recognize that working wikily is not always the answer. In many cases, it isn’t clear whether networks actually produce better results than traditional approaches. An online site like Yelp can give voice to many otherwise silent food critics, but the jury is still out whether the user-generated reviews on the site actually produce advice as good as those of the expert columnists at the *New York Times*. Similarly, while old models of

media production (newspapers, network TV), are going the way of dinosaurs, it's not clear that new, user-generated "news" will consistently be as high-quality or serve the same civic purpose as reporting created by experts. The role of the expert in this new world of "crowd-sourcing" has yet to be determined.



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Network strategies also raise a range of other challenges that come along with their benefits. How can you ensure the quality and accuracy—not just the diversity—of crowd-sourced solutions? How can you manage the information overload that accompanies open sharing of information? How can you balance the pluses of openness and transparency with the security and privacy risks of broadly and automatically sharing information? How can you clarify authority when leadership is dispersed? And when do networks make better choices than individuals or organizations?

In some cases, individual experts or hierarchical groups may be the best bet for getting the job done. This is particularly true when you need to maintain firm control of a product or process, when responsibility needs to be clearly assigned, or when the task requires specific expertise or skills, like flying a plane, playing a piano, or performing brain surgery. The key is getting smarter about when and how networks can yield the best results (see *When to Use a Networked Approach* below).

As we improve our understanding of when network solutions can be used, we will also need to develop a better sense of how to apply different network approaches to different circumstances. There is no universal network solution that can be applied in all cases. It will be critical to find the right balance between loose, decentralized ways of working and more structured, centralized approaches.

Rarely will a purely ad hoc network, like a flash mob, be the answer; nor will a citadel-style organization, like General Motors circa the 1950s, adequately address many of today's challenges. Rather, the answer lies somewhere in between. The Toyota Production System, for example, uses a mechanized factory production process, but encourages workers to "bring problems to the surface"—thereby tapping into the vast network of employees for continuous improvement. Factory line workers are far from cogs in a hierarchical machine; making their voices heard is essential

WHEN TO USE A NETWORKED APPROACH

Think about what elements are most critical to your effort.


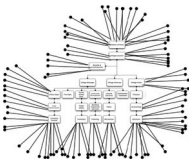

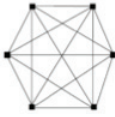

Consider a networked approach when the effort calls for:	Use a more traditional approach when the effort calls for:
Multiple perspectives or group participation	Specialized expertise or verifiable accuracy
Mobilization and engagement	Efficiency and speed of execution
A shared and dispersed leadership style	A command and control leadership style
Open and public information	Private and proprietary information

to Toyota’s success with continuous improvement. But at the same time, the hierarchy of the production line is critical to getting the work done in a timely and efficient manner.

In fact, most of the groups that we call “networks” exist somewhere on a continuum between formal hierarchies and loose informal groups (see *Networks Come in Many Different Forms* below).²⁵ And we expect to see more of these hybrid forms evolve in the space between pure networks and pure organizations. Just as very few purely online companies dominate the web, the equivalent of “clicks and mortar” hybrids is likely to evolve in the social sector space: networks with organizations supporting them, and organizations that are able to become more networked.

NETWORKS COME IN MANY DIFFERENT FORMS: A TYPOLOGY OF ORGANIZING STRUCTURES

Increasingly “network” is the cool word for any group or collective action—within, among or outside of organizations. Networks mean different things to different people. In many cases, it is used as a new frame for an old organizing structure, like a coalition or an alliance. In an effort to get clear about the range networks can span, we put together the following typology of organizing structures:

	TYPE	STRUCTURE	EXAMPLES
CENTRALIZED ↑	Nonprofit organizations (without explicit network structure)		Many local direct service providers
	Membership organizations (organizations with network component)		Sierra Club NARAL
	Nonprofits with explicit network strategy and structure		Habitat for Humanity Egypt Saddleback Church
	Coalition/alliance		Global Alliance for Vaccines and Immunizations (GAVI) Save Darfur
↓ DECENTRALIZED	Networks of networks		WiserEarth MoveOn.org
	Ad hoc networks		Flash mobs Facebook Causes

Note: These categories often overlap. Most examples will fit in multiple categories.
Source of network of network/ad hoc network image: orgnet.com

Eight Lessons to Help You Start Working Wikily

We are only just beginning to understand the pros and cons of these different approaches. And even as many people are starting to embrace the potential of social media tools, it is also important to remember that networks aren't a simple, silver bullet solution to our problems. Learning when to use networks, what type of networks to use, and how to use them well will require a great deal of experimentation. It will be important for us all to “learn wikily”—openly sharing our successes and failures to build a better collective base of knowledge for everyone.

Over the last two years, the Monitor Institute has been working intensively with the David and Lucile Packard Foundation as part of a joint “Philanthropy and Networks Exploration.” We experimented widely with many of the new network approaches (see *Philanthropy & Networks Exploration Pilots* on page 15), often with exciting results, but not without our share of challenges. Based on these experiences, along with our broader research on networks and conversations with network practitioners, we've come to learn the following lessons that we believe can help guide others interested in working wikily:

1. Design your experiments around a problem to solve, not the tools.

While hands-on experimentation with tools like wikis, Facebook, and social network mapping is critical, it's important to remember that the tools are simply a means to an end. Begin with the problem you are trying to solve and then identify tools that may help, not the other way around. The best design may be made up of the simplest tools: pen and paper for mapping your network, an email listserv for brainstorming. In our first experiment with Packard, we designed an online forum, the centerpiece of which was a wiki for gathering input to a new program strategy for reducing nitrogen pollution. We worked hard to get participants to come to the site and edit the wiki; however, in the end, the richest ideas were generated in the threaded discussions, not the wiki itself. We had designed the process around the new technology when, in fact, we may have been as well or even better served with a simple online discussion site.

In *Here Comes Everybody*, Clay Shirky explains that there is no simple recipe for success with network formation. But he notes that many of the most promising enterprises appear to follow three basic rules for operating in a more networked way: they have a promise, a tool, and a bargain. He writes, “The promise is the basic ‘why’ for anyone to join or contribute to a group. The tool helps with the ‘how’—how will the difficulties of coordination be overcome, or at least be held to manageable levels? And the bargain sets the rules of the road: if you are interested in the promise and adopt the tools, what can you expect, and what will be expected of you?”²⁶ This framework can help nonprofits and foundations avoid the trap of focusing too much on the flash of the new technologies. Think first about what you want to do



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(with a new awareness of what is possible), before choosing the specific tools that are appropriate for the job.

- 2. Experiment a lot, invest in understanding what works and what doesn't, and make only new mistakes.** We started the Philanthropy and Networks Exploration with a traditional approach toward research: a scan of the literature, interviews with thought leaders, a convening, etc. The research helped us develop a baseline understanding of networks and social media, and more clearly define our area of interest. But it wasn't until we began to experiment with social media tools and mapping and weaving networks that our learning really took off. Our experiment with the Packard nitrogen wiki to solicit the "wisdom of the crowd" provided a tremendous opportunity to learn about engaging networks external to the foundation—how to design an effective process and how to apply the appropriate social media tools. However, it also took us much longer than we thought to move up the learning curve in using new technologies. In the case of all of the pilot projects we ran, we learned as much from our mistakes as from our successes. In fact, we assigned one person on our team just to capture learning from each pilot, so we could continue to reflect and improve as we tried new things.

This process of learning from doing and the opportunity to experiment with tools multiple times proved especially helpful when we mapped the network of "ecosystem-based management" implementers on the west coast (the West Coast EBM Network). We had recently finished initial work on our first social network mapping experiment: an effort with the Community Foundation for Monterey County to map the network of youth development leaders in the city of Salinas. When we mapped the Salinas network, we approached it as an "unbounded" network—we had no defined list of network participants. We started by reaching out to an initial group of youth development leaders to ask them about their relationships with each other and with any other leaders in the sector. While there were good reasons for taking this approach, it resulted in a very lengthy outreach process during which we had to overcome many challenges related to data collection. When we embarked on mapping the West Coast EBM network, we had learned from our experience with the youth development maps. The EBM mapping was framed as a bounded network; we knew from the start who was in it. As a result, the process was much simpler, allowing us to work with our partners to develop, analyze, and share insightful network maps within weeks, rather than months, and at a fraction of the cost.

- 3. Set appropriate expectations for the time and effort required.** We began the Philanthropy and Networks Exploration experiments with an assumption that the tools would be faster and more efficient than traditional approaches. But our experience using social media and network approaches



Begin with the problem you are trying to solve and then identify tools that may help, not the other way around. The best design may be made up of the simplest tools.

suggests that they have a steep learning curve that can be quite time-consuming. As mentioned, the initial Packard social network mapping experiments were considerably more labor-intensive than expected. But we also found that the time and effort required for the mapping pilots decreased dramatically with each subsequent application. The first Packard pilot, the nitrogen wiki mentioned above, took the same amount of time and effort as if Packard had used a more traditional approach, such as convening a set of subject-matter experts. As Beth Kanter, a leading blogger on nonprofit use of social media writes, “social media takes time to see results and there isn’t instant gratification.” There is a direct correlation between the time invested and the results.²⁷

4. Prioritize human elements like trust and fun. We have learned that much of what we know about building relationships between individuals remains true for networks—online and in-person. Human elements, like trust and fun, matter. At their core, networks are about relationships, which are built on a platform of trust. Networks will only succeed if they allow time and space for individuals to build authentic working relationships. In January 2008, we convened a group of activists, funders, and thought leaders to

PHILANTHROPY & NETWORKS EXPLORATION PILOT PROJECTS

Rooted in the notion that the best way to understand net-centric approaches is to actually try them, the Packard Foundation and Monitor Institute, with the help of outside partners, ran several experiments exploring the use of social media and social network analysis tools. These pilots included:

The Nitrogen Wiki. We created an online forum to solicit input from the public on the strategy for a potential new Packard Foundation grantmaking program designed to reduce nitrogen pollution and improve agricultural practices. The ideas generated in threaded discussions and captured on a wiki at <http://nitrogen.packard.org> over a six-week period were then used to shape Packard’s initial program strategy.

Agriculture Networks. Network maps were used to help formulate a strategy for investing in a set of organizations focused on reforming federal food and farm policy. With literally thousands of players involved, the maps highlighted relationships within the agricultural community in the United States and surfaced important insights about industry dynamics that will inform efforts to promote more environmentally sustainable farming practices.

Mapping and Building Youth Development Networks in Salinas.

We partnered with one of the Packard Foundation’s local funding partners, the Community Foundation for Monterey County, to map the network of youth development service providers in the city of Salinas. The maps helped the community visualize and understand the network of relationships among youth development providers and to identify opportunities for strengthening the network.

West Coast Ecosystem-Based

Management Network. We worked with a Packard grantee, the National Oceanic and Atmospheric Administration (NOAA) Coastal Services Center, to map the existing web of relationships among individuals implementing ecosystem-based management (EBM) principles along the American west coast. The maps served as a baseline of information for convening west coast EBM implementers and for guiding discussion and catalyzing

potential collaboration across the network. The group has since been launched as a formal network.

Network Effectiveness Support.

Although Packard has long managed an organizational effectiveness (OE) program to build the capacity of its grantees to accomplish their goals, an increasing number of the foundation’s grant recipients now function as networks or use network strategies. Working with the Packard OE team, we investigated the needs of network-centered grantees to develop a menu of tools and offerings for supporting networks.

Working Wikily Blog (workingwikily.net).

We, at the Monitor Institute, have been running our own experiment at working wikily—a blog for sharing our learning about networks. We are tracking a number of information sources and aggregating information and analysis on network developments that have particular relevance for the social sector.

explore how networks can be leveraged for social change. At the gathering, youth activist James Toney told us, “People aren’t just coldly linking to you online, they’re ‘friending’ you.” Networks are a social activity. And as with any social activity, people join groups to be rewarded, and need to enjoy what they are doing. Law professor and designer of collaborative technologies Beth Noveck agreed with James, “Fun matters. It’s about harnessing the enthusiasm of the crowd, not just its wisdom. And you do that by making things fun.”

5. Understand your position within networks and act on this knowledge.

As a funder, it’s easy to think of yourself and your foundation as outsiders to a network. And as a network leader, it’s easy to focus exclusively on the target network you’re weaving and to forget the many networks you already operate within. Networks have traditionally been hard to see. But with the growing accessibility of network mapping and visualization tools, you can see what was previously invisible—hidden in the tacit knowledge of many different network participants. What networks are you already in? Are you at the periphery of the network? Are you the network hub? Who in the network should you help to connect? Who is missing from the network? By becoming aware of your position within networks and better understanding the network’s dynamics, you can identify opportunities for impact and act on that knowledge. The maps we developed with the Community Foundation for Monterey County were used by the foundation to understand and promote relationships between government agencies, nonprofit organizations, schools, and local funders. When the foundation leaders took the maps out to the community, they found that making the network visible helped people see themselves in a new way—as part of a larger community dedicated to a common goal of helping youth. As a result, a number of local officials and community leaders have begun meeting regularly to coordinate activities and share information in order to improve local outcomes for youth.

In some cases, simply being aware of your position—and power—within networks is an important first step. When we worked with the Packard Foundation’s Organizational Effectiveness team to explore how the foundation could best support networks, an important realization was that the foundation’s network effectiveness work was more complex than just providing external support. Rather, in the process of supporting individual networks and convening and connecting grantees, the foundation became a “node”—and often a “hub”—in the social change networks it supports. Acting on this knowledge is critical if foundations are to help networks increase their effectiveness.

6. Push power to the edges. The new social tools are empowering people to self-organize quickly and easily, without burdensome centralized infrastructure. The tools allow many people to connect with one another, with little



Much of what we know about building relationships between individuals remains true for networks—online and in-person. Human elements, like trust and fun, matter.

increase in the marginal costs of bringing in even very large numbers of additional participants. Perhaps the most vivid example of this new reality is the emergence of “smart mobs”—large groups of people linked by cell phones, text messages, emails, or other technologies who assemble suddenly in a public place to perform some collective action. Since text messages brought people together in a smart mob in the Philippines in 2001 to protest government corruption and help oust then-President Joseph Estrada, these types of impromptu gatherings have empowered people to come together to achieve social goals ranging from war protests to group purchasing discounts. For social sector leaders, the self-organizing potential of networks presents an opportunity to decentralize and push power to the edges of the network. The 2008 Obama campaign succeeded in empowering its network of supporters by providing tools like MyBarackObama and acting on the creativity and energy bubbling up from throughout the network—seen famously in the campaign’s embrace of street artist Shepard Fairey’s rendition of Obama, which became the campaign’s most enduring image.

7. Balance bottom-up and top-down strategies for organizing people and effort.

The emergent, bottom-up creativity and decentralized decision-making of networked approaches often seem incongruous with the traditional command-and-control approaches of many private foundations. Funders, like NGOs and most organizations of any sort, are typically goal-directed, while many networks are largely self-directed. Once networks are set in motion, you can’t expect to stop them or change their direction. As a funder, you can stay involved, but you can’t necessarily stay in charge. According to *Wired* magazine founding editor Kevin Kelly, what is needed is a balance between top-down and bottom-up logic. Citing the presence of high-level “editors” who helped to identify and control persistent vandalism within the bottom-up network that built Wikipedia, Kelly explains, “The exhilarating frontier today is the myriad ways in which we can mix out-of-control creation with various levels of top-down control.”²⁸

The Case Foundation, for example, launched the Make It Your Own Awards to promote civic engagement and to test a citizen-centered approach to philanthropy that gives real people an opportunity to submit ideas for improving their communities, to serve as reviewers, and then to vote on the best ideas for Case to fund. It was a largely unprecedented step for a private foundation, as people could easily end up submitting and selecting grant ideas that didn’t match the foundation’s goals and principles. But the foundation also built in a slight control. While an open group of public judges selected the top 100 ideas, a set of advisors selected by Case culled the list down to 20 grant recipients, from which the public then selected four grantees to receive significantly larger grants. This mid-level culling allowed the foundation to balance the creativity and emergent decision-making of the group with the



“The exhilarating frontier today is the myriad ways in which we can mix out-of-control creation with various levels of top-down control.”
– Kevin Kelly

professional advice of experts in order to choose ultimate winners aligned with the foundation's goals.

8. Be open and transparent; share what you're doing and learning as a matter of course.

The new social tools invite sharing information and making resources and knowledge available to more people, which allows users to freely build on the ideas and work of others. Blogs, for example, are rooted in the practice of openly sharing perspectives, ideas, and experiences, and they often borrow from, link to, and build on one another. Online "mash-ups" combine data from more than one source into a single integrated tool (for example, people have combined satellite topographic data with maps from Google to show roughly how coastlines would look if sea levels change). Using these tools successfully requires a mindset and approach toward getting things done that values openness and transparency—and may be antithetical to traditional models of management and communications. Embracing this network mindset and openly sharing what we've been learning and doing has been a challenge throughout the Philanthropy and Networks Exploration because it takes time and dedicated resources. We have been experimenting with our Working Wikily blog for the past six months. We're finding that it is very challenging for our team (the authors of this paper included) to make the time to share learning on our blog or to engage in conversation on other blogs. Our solution has been to have a dedicated team member who posts on the blog. In effect, we have opened up our monitoring and scanning of developments in the field for others to see. And, we are still learning how to work wikily ourselves.

The Packard Foundation recently supported the development of a strategic plan for strengthening a network of international reproductive health leaders. The group, with the leadership of consultant Eugene Kim, has made an impressive effort to work wikily. They found that intentionally "leaving a trail" of network-related activity, signals to those within and outside of the network that the community is alive, encouraging more network activity. As the network writes in their collaboratively authored report, "We are working more consciously to Leave a Trail in our work. To model this desired behavior, we intentionally drafted our ... final report on this open Wiki. This challenged us at first, but we realized that the more transparent we could be about all of our work, the more we could continue to learn from each other."²⁹

HOW CAN GRANTMAKERS BEST SUPPORT THE WORK OF NETWORKS?

In an effort to better understand the needs of networks and the ways in which grantmakers can help increase their effectiveness, we did a study of Packard Foundation grantees that are structured as networks. The study included a series of in-depth interviews with grantee networks and a survey circulated to over 100 networks supported by the Packard Foundation. Our research surfaced the following ways that foundations can support networks:

1. Help leaders understand the nature of networks and related tools and approaches so they can take full advantage of what their network can do. Support learning opportunities for network leaders, like social media training, and develop accessible literature and tools that leaders can use to better understand their networks and to communicate the power of their networks to others.
2. Help leaders address network-specific issues related to strategy, leadership, governance, participation, and communications. Provide access to practical knowledge and consulting, and when appropriate, help networks apply network approaches and tools, like social network mapping and web 2.0 tools.
3. Support activities and infrastructure that allow networks to operate effectively, such as support for staff salaries, communications infrastructure, and forums for increasing connectivity among network participants.³⁰

Getting Started

At the Monitor Institute, we believe the long journey to discover and understand the power and potential of working wikily has only just begun. The use of networks to achieve social impact will only increase in the coming years. Today's social and environmental problems increasingly cross conventional issue and geographic boundaries, and making systemic progress on these complex problems will require us to connect and coordinate our efforts across traditional borders, sectors, and organizations. No one individual or organization—not even the largest of governments, corporations, or foundations—will be able to move the needle on many of these problems on their own. Achieving meaningful change will often require working with a network mindset.

In fact, it has already become difficult to imagine what it would look like to *not* work wikily. Envision the profile of a leader who deliberately spurns networks. She would work in isolation, tightly holding on to the resources and knowledge she has accumulated. She would have little access or connection to the new ideas and work that is happening around her, and would have little sense of whether her work duplicated or impeded the efforts of others. And her desire for control would weaken any possibilities for increasing scale and would limit any synergies with what others might be doing.

It's a lonely and disconnected picture. And while the portrait is an exaggeration, the point is that working wikily—embracing the principles of openness, transparency, and decentralization—is not especially radical anymore. The tough part is really walking the talk and integrating networks more deeply into our mindsets to see what might emerge.

Doing this doesn't have to be difficult. Working wikily isn't an all or nothing proposition. Hold on to control where it feels necessary, but look for small, strategic opportunities to let go. Find an excuse to try tapping the knowledge of a few people outside the usual circles. Share information that wouldn't normally be shared, at least with a few trusted partners. Weave a network by closing a triangle—introducing two people who don't yet know each other, but should. Build connections by starting with small, simple partnerships that build the trust and relationships that can become the basis for larger collaborations down the line.

Working wikily doesn't have to start with anything fancy. There doesn't need to be a wiki or a blog or a tweet involved (although those all are interesting things to try). Because it's not really about the technology. It's about trying to increase leverage and effectiveness by thinking and working in new ways. It's about reimagining social change with a network mindset. It's about working wikily.



Working wikily—embracing the principles of openness, transparency, and decentralization—is not especially radical anymore. The tough part is really walking the talk.

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Helpful Resources for Understanding Networks

The following blogs, articles and books are a few of the resources we have found especially informative and insightful while researching networks. This is far from a comprehensive list. For additional resources, please visit our Working Wikily blog and website, <http://workingwikily.net>.

BLOGS AND WEB SITES

CPsquare. "Technology for Community project." **WEB SITE:** http://cpsquare.org/wiki/Technology_for_Communities_project
A wiki project that is gathering information and best practices on how the new technologies can help steward communities of practice.

Beth Kanter. "Beth's Blog: How Nonprofits Can Use Social Media." **WEB SITE:** <http://beth.typepad.com/>
One of the best resources and conversations on nonprofits and social media. Beth describes it as, "A place to capture and share ideas, experiment with and exchange links and resources about the adoption challenges, strategy, and ROI of nonprofits and social media."

Marty Kearns. "Advocacy 2.0." **WEB SITE:** <http://www.advocacy2.org/>
A wiki-style site on network basics and resources created by Marty Kearns and the folks at Netcentric Campaigns. Includes helpful information on the building blocks of healthy networks. Also, check out the Netcentric Campaigns site and Marty's blog (www.netcentriccampaigns.org) for insights on activism "in the age of connectivity."

Nonprofit Technology Network. "WeAreMedia Project: The Social Media Starter Kit for Nonprofits." **WEB SITE:** <http://www.wearemedia.org/>
A wiki and community of people interested in social media and nonprofits that is gathering an impressive collection of resources on social media strategies, tools, and best practices.

Valdis Krebs, Jack Ricchiuto & June Holley. "Network Weaving." **WEB SITE:** <http://www.networkweaving.com/blog/>
A blog on social network mapping and weaving, with case examples and applications.

ARTICLES AND REPORTS

Valdis Krebs and June Holley. "Building Smart Communities through Network Weaving" (2006).

An introduction to the basics of networks, how they evolve, and how they can be shaped for social impact—illustrated through the Appalachian Center for Economic Networks (ACEnet) case study.

Stephanie Lowell. "Building the Field of Dreams: Social Networks as a Source of Sector-Level Capacity in the After-School World" (2007).
An insightful overview of the network weaving processes supported by the Barr Foundation and what they learned.

Peter Plastrik and Madeleine Taylor. "Net Gains: a Handbook for Network Builders Seeking Social Change" (2006).
A great starting place for understanding networks, their common attributes and how to leverage networks for social impact. Includes sections on evaluating networks and social network analysis.

David Renz. "Reframing Governance" (2006).
Renz argues that given the increasing complexity and scale of social problems, nonprofit governance systems need to operate more like networks.

Bill Traynor. "The Bright Future of Community Building" (2008).
Traynor outlines a framework for understanding place-based community building, focusing on the ways individuals engage in networks and relationships.

Jane Wei-Skillern and Sonia Marciano. "The Networked Nonprofit" (2008).
An engaging article examining how nonprofits are achieving greater impact by working through networks.

BOOKS

Patti Anklam. *Net Work* (2007).
A theoretical and practical guide for network building. Anklam's book provides a helpful taxonomy of a network's purpose and structure, and discusses practical issues of concern to network leaders.

Leslie Crutchfield and Heather McLeod Grant. *Forces for Good: The Six Practices of High-Impact Nonprofits* (2007).
Crutchfield and Grant identify one of the six practices of high-impact nonprofits as "nurture nonprofit networks." See Chapter 5 for stories and an analysis of how nonprofits are achieving impact through networks.

Allison Fine. *Momentum* (2006).
Fine chronicles the ways in which social media facilitate more connected and effective activism. Fine also provides activists with advice and guidelines for the use of these new tools to promote social change.

Charlene Li and Josh Bernoff. *Groundswell: Winning in a World Transformed by Social Technologies* (2008).
Forrester analysts, Li and Bernoff, provide an accessible and practical primer on social media.

Clay Shirky. *Here Comes Everybody: The Power of Organizing Without Organizations* (2008).
A provocative account of how the new technologies are transforming the way people form groups and what all this means for our economy and society.

Tom Watson. *Cause Wired: Plugging In, Getting Involved, Changing the World* (2008).
Watson explores the intersection of technology and social action through a rich set of stories about online activism.

Paul Vandeventer and Myrna Mandell. *Networks that Work* (2007).
An accessible guide for social sector practitioners who wish to create or work with networks.

Markos Moulitsas Zuniga. *Taking on the System: Rules for Radical Change in a Digital Era* (2008).
Zuniga, founder of the DailyKos blog, offers grassroots activists an Alinsky-inspired roadmap for using web 2.0 tools for social change.

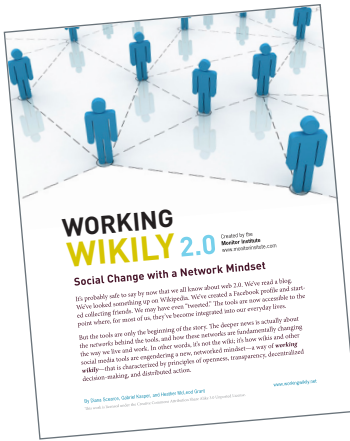
ABOUT THE PHILANTHROPY AND NETWORKS EXPLORATION & ACKNOWLEDGEMENTS

The Philanthropy and Networks Exploration (PNE), a partnership of the Packard Foundation and Monitor Institute, was an inquiry into how foundations can tap and support the power of networks. It began in early 2007 and ended in the spring of 2009.

We began the learning journey motivated by the belief that networks offer a source of decentralized power, creativity, and wisdom that the Packard Foundation—and philanthropies more broadly—can and should tap into. We started by reaching out to leading academics and practitioners to understand the current landscape; we got a flavor of the accelerating innovation and activity in the world of networks, and quickly became aware of how much there was to learn. When we started experimenting with using collaborative technologies and social network mapping, we really began to gain traction. We then focused our work on running pilot projects, and learning from these experiments and from the much broader set of developments and new knowledge about networks being created outside of our work. At the same time, we ran a research and strategy project to develop an approach for enabling the Packard Foundation to support and increase the capacity of networks (including the capacity of organizations to work through networks). Findings from this research led to the development of a set of tools and a series of “network effectiveness” workshops for Foundation grantees. More information about the project and our ongoing monitoring of network-related developments can be found at www.workingwikily.net.

The Philanthropy and Networks Exploration team has included Katherine Fulton, Diana Scarce, Heather McLeod Grant, Gabriel Kasper, Noah Flower, Xi Wang, Aron Kirschner, Chase Thomas, Athena Mak, and Bianca Bosker from the Monitor Institute; Andrew Blau from Global Business Network (a partner organization of the Institute); Angus Parker (an independent consultant); and Chris DeCardy, Stephanie McAuliffe, Gale Berkowitz, Matt Sharp, Anastasia Ordonez, and Kathy Reich from the Packard Foundation. This report was developed from the tremendous thinking and contributions of all of the members of the team.

In addition to the PNE team, we are indebted to the many thought leaders, activists, and funders who are pioneering the leading practices of social impact networks, and who significantly shaped our thinking over the course of the two and half years of the initiative. We are particularly thankful to the following people for their thought leadership, creativity, and willingness to collaborate with us: Jeff Bryant, Jamais Cascio, Noshir Contractor, Roberto Cremonini, Jamie Dean, Neal Gorenflo, June Holley, Jeff Jackson, Beth Kanter, Harald Katzmair, Marty Kearns, Eugene Kim, Valdis Krebs, Thomas Kriese, Kai Lee, Lauren Levitt, Maurice Monette, Kristin Sherwood, Clay Shirky, Walt Reid, Judy Sulsona, Vikki Spruill, Shiree Teng, Kathy Toner, and Jane Wei-Skillern. The project also owes a special thanks to Lucy Bernholz, who—through a short suggestion in her blog—helped us make the title of our report more alliterative and catchy.



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ABOUT THE MONITOR INSTITUTE

Monitor Institute's mission is to help innovative leaders develop and achieve sustainable solutions to significant social and environmental problems. We believe achieving these solutions will require a combination of bold leadership, innovative ideas, effective action, and efficient capital. We leverage the resources of the Monitor Group, a global professional services firm, to operate as part consulting firm, part incubator of new approaches, and part think tank. We work with philanthropists, social entrepreneurs, businesses, and government agencies worldwide to surface and spread best practices and to pioneer next practices—breakthrough approaches to public problem solving.

ABOUT THE PACKARD FOUNDATION

The David and Lucile Packard Foundation is a private family foundation created in 1964 by David Packard, cofounder of the Hewlett-Packard Company, and Lucile Salter Packard. The Foundation provides grants to nonprofit organizations in the following program areas: Conservation and Science; Population and Reproductive Health; and Children, Families, and Communities. The Foundation makes national and international grants and also has a special focus on the Northern California Counties of San Mateo, Santa Clara, San Benito, Santa Cruz, and Monterey. Foundation grantmaking includes support for a wide variety of activities including direct services, research and policy development, and public information and education.

