BENDABLE LIFELONG LEARNING SYSTEM

Developmental Evaluation Report

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Executive Summary

What is Bendable?

Bendable is a community-based **lifelong learning system** providing all residents with access to learning in order to create more resilient individuals, economies, and communities. The platform is a learning market place featuring a wide database of over 1,500 resources to learn online and a curated set of learning opportunities, enhancing users' knowledge and skills as well as community connections. Launched in South Bend, Indiana in June 2020 as a platform designed "for and by the people of South Bend," Bendable is stewarded by the St. Joseph County Public Library and supported by the Hub (also known as the Drucker Institute team).

Bendable is grounded in an underlying philosophy: that **providing equal access to learning opportunities and learner support** for personal and job-related growth will **enhance the resiliency** of all who use it and **will lead to equitable outcomes**. Driven by the belief that lifelong learning happens at multiple levels, the initiative aims to provide learning content that is relevant and trustworthy, and to catalyze change and learning with individuals as well as within organizations (e.g., employers, community organizations). The Hub and Library recognize that access to learning is not sufficient for learning to occur, and aims to support and foster a habit of learning across the community. By building users' individual resiliency, relationships with one another, and involving employers, Bendable will contribute to economic and community resiliency across South Bend.

> *"Bendable isn't going to solve poverty. It isn't going to solve structural racism. It isn't going to solve anything in one fell swoop. But, it can be a **part of a powerful set of solutions** that communities need to try, and provide **easy and almost radical access to resources**."*
>
> - Rick Wartzman, Drucker Institute, "How Community Plays a Critical Role in Fostering Lifelong Learning" (*Forbes*, September 2020)

What was the focus of the developmental evaluation?

From December 2019 to December 31, 2020, the Lumina Foundation commissioned FSG to conduct a developmental evaluation of Bendable. FSG served as the evaluation and learning partner, supporting the Hub's decision-making, strategy, and early operations, both pre- and post-launch. In addition, FSG captured findings and lessons from this evaluation to guide and inform expansion of the lifelong learning platform to other geographies.

The developmental evaluation was guided by a set of questions that were developed with input from the Hub team:

1. How, to what extent, and why are South Bend residents **accessing and engaging** with Bendable - and who is doing so?

2. What learning **opportunities and content** are available through Bendable, and how are they meeting residents' learning needs?

3. How, to what extent, and why is the Hub adapting its **approach** in light of the ongoing COVID-19 crisis?

4. To what extent is Bendable helping residents, organizations, and employers in South Bend build **relationships and connections** with one another? To what extent is this contributing to a strengthened sense of community?

5. How and to what extent is the physical and digital **infrastructure and operations** of Bendable adapting to meet residents' needs?

6. What about the Bendable experience in South Bend can inform **replication and scale efforts**?

This report reflects the findings based on the data the evaluation team was able to collect to answer these learning questions.

What are we learning about Bendable's early implementation?

Analytics from the first six months since Bendable's launch indicate that **Bendable has been successful in its launch and early implementation in reaching and engaging people in South Bend**. User engagement metrics show that Bendable continues to have a steady stream of visitors and account sign-ups from the Greater South Bend area, particularly among geographies that are predominantly made up of communities of color. Bendable is also being embedded in local organizations (e.g., Beacon Health System, City of South Bend Public Works, Goodwill), reflecting the platform's integration into the local community.

Figure A. Summary of Bendable visitors as of December 4, 2020

It is important to note that the COVID-19 pandemic has substantially impacted the original launch and implementation plans for Bendable, limiting the platform's in-person engagement that was considered

critical for building uptake and engagement. In spite of the pandemic, the Hub and Library have been successful in the platform's launch and early implementation. They adapted, implementing Bendable in an almost exclusively virtual environment, and seeking out opportunities to meet residents and partners where they were.

Several key factors are driving Bendable's early success:

1. **Community buy-in**: The Hub has established strong relationships that have been central to building trust and engagement with Bendable. The Hub intentionally invested staff resources to support building community buy-in, and the continuous flow of information to and from community members has ensured that Bendable continues to be designed and implemented for and by the people of South Bend. In addition, the Hub has learned to balance speed and efficiency in design and implementation with the time and space necessary to gather and incorporate feedback, including considering partner priorities and equity implications.

2. **Marketing and outreach**: The Hub and Library have effectively adapted marketing and outreach efforts to the uncertain and dynamic context of the COVID-19 pandemic. As a result, Bendable has succeeded in reaching and engaging people in South Bend during the first six months since launch. However, while residents are hearing about Bendable, there are differing and additional notions of what Bendable is and could be, which need to be clarified moving forward. In addition, accessibility continues to be a challenge that outreach efforts alone cannot solve.

3. **Community engagement**: The Hub and Library made specific efforts to reach underserved populations – particularly communities of color and low-income communities. In addition, as the platform has been implemented, the Hub and Library have increasingly focused on partner organizations as the key strategy for building and scaling user engagement and depth of learning.

4. **User experience**: Designing and adapting Bendable to reflect the community's makeup, interest, and needs increases the likelihood that users will engage with the content and return to the platform. However, building and sustaining user engagement takes time. It is still early in Bendable's implementation, and the current pandemic context has unexpectedly limited awareness and in-person engagement

5. **Hub**: The Hub team's structure and culture have been central to Bendable's implementation and success in advancing use of the platform. For the Hub, this has manifested in an intentionality to be inclusive, responsive, and adaptive in Bendable's design and implementation.

6. **Library**: In addition, the Library has assumed the role of the core owner and implementer of Bendable, which is more likely to support Bendable's sustainability and ability to achieve its goals. Together, The Library and Hub have effectively worked through challenges related to workstyle, pace, and expectations.

What implications can we draw from our learnings for scaling lifelong learning systems both in South Bend and in other geographies?

Based on suggestions from key Bendable stakeholders (e.g., Hub, Library, external partners, community stakeholders) as well as other implications based on the evaluation findings, the Hub can reflect on several **considerations for its activities in South Bend** moving forward:

1. Maintain and build additional **feedback loops** with community members and organizations.

2. Continue to **evolve the content and design** of the Bendable platform.

3. Clarify – and potentially simplify – Bendable's **value proposition**.

4. Continue to **adapt marketing and outreach** strategies to meet the needs of specific communities.

5. Apply a **targeted universalism** approach in order to reach and engage residents who face disproportionate barriers.

6. Stay actively accountable to the principles and considerations in the **equity guide** (a document created by FSG to support the Hub's ongoing learning and awareness-building related to equity).

7. Stay in close dialogue on and continue to evolve the **transition plan** for the Hub and the Library.

8. Continue to embed **evaluation and learning practices** in the Hub's activities.

In addition, the developmental evaluation identified several principles of practice as the essential ingredients for success in implementing and scaling a lifelong learning system in other geographies:

1. Actively **engage residents** to ensure the lifelong learning system **reflects the needs, interests, and makeup of the community**.

2. Understand the **historical, social, political, and economic context** of each geography.

3. Allow **substantial lead-time for building trusting relationships** with city and community organizations, and residents.

4. **Tailor** outreach, engagement, and marketing strategies.

5. Commit to continuously thinking about **inclusion**.

6. Learn and fail fast, but also build in time to **pause and reflect**.

7. Maintain a team culture of strong **trust and mutual respect**, grounded in a shared vision.

8. Engage with **authenticity and humility** with the community.

9. Support **ongoing evaluation and learning** to capture and share learnings within the team, with key stakeholders, and with funders.

Introduction

Report Overview

The Lumina Foundation commissioned FSG to conduct a developmental evaluation of the lifelong learning platform, *Bendable*, from December 2019 to December 31, 2020. The FSG team's role, as the evaluation and learning partner, was to support the Hub's (also known as the Drucker Institute team) decision-making, strategy, and early operations, both pre- and post-launch. In addition to supporting learning for the Hub in the early days of the platform's launch in South Bend, Indiana, the findings and lessons from this developmental evaluation are also intended to guide and inform expansion of the lifelong learning platform to other geographies.

This report summarizes findings and lessons from the evaluation in three sections:

I.   **Overview of Bendable.** Provides an overview of what Bendable is, the core team supporting it, and the context in which the platform was designed, developed, launched, and is currently being implemented.

II. **Findings from Bendable's Early Implementation.** Presents the evaluation findings, including analytics and indicators of Bendable's initial success from launch (June 2020) to November 2020 as well as key learnings in the context of six success factors for Bendable.

III. **Implications for Scaling Lifelong Learning Systems.** Situates the learnings in a series of suggestions and recommendations for Bendable in South Bend, as well as principles of practice for scaling the lifelong learning system to other geographies.

Bendable Overview[1]

Bendable is an ambitious undertaking led by the Hub to provide all residents with access to learning, in order to create more resilient individuals, economies, and communities. The initiative was launched in South Bend, Indiana in June 2020 and is stewarded by the St. Joseph County Public Library (SJCPL or the Library) and supported by the Hub. Bendable provides users with recommendations for learning from a wide database of resources to learn online and a curated set of learning opportunities ("collections" and "shelves"), enhancing their knowledge and skills as well as supporting community connections. The underlying philosophy of Bendable is that **providing equal access to learning opportunities and learning support** for personal and job-related growth will **enhance the resiliency** of all who use it and **will lead to equitable outcomes**. Driven by the belief that lifelong learning happens at multiple levels, the initiative aims to provide learning content that is relevant and trustworthy, and to catalyze change and learning with individuals as well as within organizations (e.g., employers). The Hub and Library recognize that access to learning is not sufficient for learning to occur, and aims to support and foster a habit of learning across the community. By building users' individual resiliency, relationships with one another, and involving employers, Bendable will contribute to economic and community resiliency across South Bend.

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[1] "Section I: Overview of Bendable" provides a more detailed overview of Bendable's history, the Hub, the role of the Library, and current context.

Evaluation Purpose, Questions, and Approach

In 2019, FSG helped develop an assessment and learning framework for Bendable. This framework, along with the accompanying assumptions, form the original Bendable Theory of Change.[2] The framework recommended a developmental evaluation be undertaken to support learning in the late design, beta, and early launch of Bendable. As a result, the Hub invited FSG to be the evaluation and learning partner for Bendable. The Lumina Foundation was interested in understanding more about the potential outcomes of Bendable and decided to fund the developmental evaluation. As part of this evaluation and their post-launch learning, the Hub led a process to update Bendable's Theory of Change[3] with input from the Library and FSG.

Purpose

Given the emergent nature of the work leading up to and after Bendable's launch, the purpose of the developmental evaluation was to provide data and learnings to support the Hub's decisions concerning Bendable's strategy and early operations – especially as it relates to reaching the most underserved populations in South Bend – as described and recommended in the Bendable assessment framework.[4] Additionally, the developmental evaluation aimed to surface effective principles of practice that could guide scaling the lifelong learning system to other geographies. Specifically, the evaluation focused on providing the Hub with timely, useful, and credible information from December 2019 to December 2020 – during the final design and early implementation stages of Bendable. Longer-term changes in attitudes and behaviors, as well as impacts on the City of South Bend, will require future evaluation work.

Guiding Questions

The developmental evaluation was guided by a set of questions (see below), that were developed with input from the Hub team.

Table 1. Learning questions that guided the Bendable developmental evaluation

Learning Question	Supporting Questions
LQ 1. How, to what extent, and why are South Bend residents **accessing and engaging** with Bendable - and who is doing so?	• **Who is using Bendable** and why? Which ZIP codes reflect the greatest level of use? To what extent and how is **Bendable reaching and engaging South Bend's underserved populations** (e.g., recently incarcerated, earn under $18/hr., historically marginalized)? • How are users **hearing** about Bendable? What outreach efforts are most successful in getting community members to explore Bendable? How or where are they accessing the Bendable platform (e.g., phone, library, home computer)?

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[2] See Appendix A: Bendable Theory of Change – July 2019.
[3] See Appendix B: Bendable Theory of Change – Updated October 2020.
[4] Key assumptions and the theory of change from the original evaluation assessment framework (July 2019) are included in Appendix A.

	• What has **supported** residents' access to using the platform? What **challenges are Bendable users having with the platform**? What changes may be important to consider that increase access and use?
	• To what extent and how are **stakeholders acting as advocates and ambassadors** for Bendable? How are these stakeholders being identified and engaged? How are they building and supporting momentum for Bendable? How are they developing the capacity to perform this role?
	• How is the **COVID-19** situation affecting community members' access to Bendable, who uses it, and for what purposes?
LQ 2. What learning **opportunities and content** are available through Bendable, and how are they meeting residents' learning needs?	• What resources are **Bendable users most interested in on the platform**? Why do they sign up, and what are their hopes or expectations? What do they come back to? How much time are they spending on different parts of the platform? What is the cadence of use by users?
	• What supports and/or detracts from **continued engagement** with Bendable (e.g., badging, *Community Collections*, in-person activities)? Does the platform reflect community members' needs and priorities?
	• What types of **programming have stakeholders** developed to support Bendable? Who is participating, and with what levels of satisfaction? To what extent has this programming influenced participants' use of the Bendable platform and vice-versa?
LQ 3. How, to what extent, and why is the Hub adapting its **approach** in light of the ongoing COVID-19 crisis?	• What **outreach and communications strategies** are the Hub and Library using to reach South Bend residents? To what extent are these strategies reaching all residents? Who might be missed, and what are the implications of this? Which communications and outreach methods are **more or less effective**? How does that vary by population?
	• What **content** is being added and by whom? How was the decision made to add this content to Bendable? With what objectives/goals? How can learning related to crisis content be **sustained and/or transferred** to other content?
LQ 4. To what extent is Bendable helping residents, organizations, and employers in South Bend build **relationships and connections** with one another? To what extent is this contributing	• To what extent and how are **in-person learning events** facilitating new relationships and connections with the community?
	• How are employers **supporting and embedding learning** in the workplace? To what extent are employers finding value in and willing to continue to engage with creating *Community Shelves*?

to a strengthened sense of community?	
LQ 5. How and to what extent is the physical and digital **infrastructure and operations** of Bendable adapting to meet residents' needs?	• What role does the **physical component** of Bendable (e.g., library branches, local tech centers, places of worship) play in supporting the platform and engaging users? • To what extent and how well has the **Library been able to serve as the steward** for Bendable? How has the Library **adapted to the needs and expectations** of Bendable? What has **worked well?** What have been the biggest **challenges**? • What has been the **role of the Hub**, and how effective has it been in supporting Bendable's development and implementation? What has worked well, and what else do they need to be effective? • To what extent and how has the **communications campaign** generated interest in, and signups for Bendable? To what extent are these numbers satisfactory? What role has the Hub played vs. the Library? • How is the Hub continuing to center **equity** into its processes (e.g., development of materials, communications)?
LQ 6. What about the Bendable experience in South Bend can inform **replication and scale efforts**?	• How is Bendable reaching populations that are experiencing **barriers to accessing digital platforms/infrastructure**? • What **efficiencies and inefficiencies** are resulting from an all-virtual environment? • What might be **critical principles of effective practice** that should guide future scaling efforts in addition to the principles developed by the Hub?

This report reflects the findings based on the data the evaluation team was able to collect to answer these learning questions. Due to the ongoing COVID-19 pandemic and operating in a nearly all-virtual environment, the team was limited in its ability to collect information on LQ2 (collecting sufficient, direct user input) and LQ5 (due to restrictions on in-person components of Bendable's implementation).

Developmental Evaluation Approach

FSG collected data through a wide range of activities and from a wide range of sources to inform learnings in two phases:

1. **Phase 1 – Pre-launch & Beta Testing (December 2019 to May 2020)** related to launch preparation efforts (e.g., communications/marketing campaign for Bendable, processes and products to guide implementation, relationship building, beta testing)
2. **Phase 2 – Post-launch (June to November 2020)** to understand Bendable usage, awareness, interest, and engagement in the early post-launch period

Based on the goals of this developmental evaluation, the FSG team employed an approach that is:

- *Utilization-focused:* Providing information with the understanding that it will be used for strategic, programmatic, and operational improvement and decision-making by the Hub team
- *Learning-oriented:* Providing information that will challenge assumptions, surfacing successes, barriers, and opportunities in support of continuous adaptation
- *Equity-focused*: Providing information that addresses the ways in which Bendable is reaching and engaging underserved and marginalized populations in South Bend

The FSG team collected data from a wide variety of individuals and organizations, using multiple methods,[5] including 853 sources of input across:

- User surveys (including pre-launch beta test user survey and post-launch user survey)
- Interviews with key stakeholders (including the Hub, Library, and other South Bend community stakeholders)
- Data analytics from the Bendable site
- Data analytics from content provider sites
- Participant observation in regular stakeholder meetings
- Participant observation in Hub and Library meetings
- Regular discussions and learning sessions with the Hub and Library teams
- Secondary data on the history and demographics of South Bend

The evaluation approach was guided by a strong commitment to take into account issues of equity, to understand how and in what ways the various activities undertaken on behalf of Bendable are reaching, affecting, and having an impact on South Bend residents—as well as those supporting the initiative. The FSG team employed equity-based evaluation and data collection practices, including:[6 7 8 9]

- Understanding the history, culture, and demographics of the city of South Bend.
- Taking into account the particular needs and characteristics of different populations engaged in our data collection activities.

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[5] More detail on the full set of developmental evaluation data collection activities and methodology can be found in Appendix C: Data Collection Methodology.

[6] The FSG team acted in accordance with the principles and values described in the American Evaluation Association (AEA) Statement of Cultural Competence, abided by the Program Evaluation Standards and the AEA Guiding Principles for Evaluators, and guided by the Equitable Evaluation Initiative (EEI) Equitable Evaluation Principles.

[7] Yarbrough, D. B., Shulha, L. M., Hopson, R. K., and Caruthers, F. A. (2011). *The Program Evaluation Standards: A guide for evaluators and evaluation users* (3rd Ed.). Thousand Oaks, CA: Sage.

[8] American Evaluation Association. (2018). *Guiding Principles for Evaluators*.

[9] Equitable Evaluation Initiative. (2017). *The Equitable Evaluation Framework™*.

- Considering how our team's implicit biases, or our personal mental models, might have contributed to assumptions about what change matters, how it occurs, and whom it affects.
- Thinking about whose voices may have been important to include in the work, both to improve quality and credibility of findings.
- Using existing data when possible.
- Taking into account how cultural norms and practices might have influenced participants' comfort with, or willingness to engage in, certain types of data collection activities.
- Working to ensure that data collection methods were accessible for participants.
- Where appropriate, disaggregating data by relevant race, ethnic, or gender variables, and identifying and acknowledging how the intersection of multiple variables or identities can interact to create unique outcomes and experiences.
- Considering if and how our data analyses reflected cultural biases or stereotypes, and alternative explanations.
- Ensuring that any photos, graphics, and icons used to report the results avoided imagery that further perpetuates stereotypes and inequality.

The data collection protocols were developed based on the July 2019 evaluation and assessment framework. These evolved over time based on what the Hub and Library teams were learning post-launch and what data the Hub, Library, and evaluation teams were capable of collecting – primarily through ongoing analytics and dashboards, marketing and outreach record-keeping, participant observation in meetings, and interviews. FSG worked closely with the Hub team (Rick Wartzman, Head of the KH Mood Center for a Functioning Society; Sarah Zaner, Senior Director of Lifelong Learning; and Lex Dennis, Director of Lifelong Learning) to seek their input to the evaluation design and timeline, feedback on our data collection activities and protocols, and engage in co-sense making around the findings and recommendations. FSG also sought input from additional Hub team members (Lawrence Greenspun, Director of Public Sector Engagement; Fred Teague, Lifelong Learning Consultant); as well as St. Joseph County Public Library (SJCPL or the Library) team members (Jennifer Henecke, Communications Manager; Norah Alwalan, Marketing Specialist). Implementation and sustainability of Bendable in South Bend will be a continued joint effort across the Hub and Library teams.

Section I: Overview of Bendable

Before diving into the evaluation findings, it is important to understand what Bendable is, the key organizations involved in its implementation, and the context in which Bendable is operating.

Introduction to Bendable

Bendable is a community-centered lifelong learning platform created and led by the Hub and the Library. It is designed for residents to acquire new knowledge and skills through online courses and in-person opportunities in order to create more resilient individuals, economies, and communities. The platform provides users access to a wide database of resources to learn online, including over 1,500 resources—for professional and personal learning—from 20 local and national content partners. The platform also contains a curated set of learning opportunities and features to enhance users' knowledge and skills as well as support community connections. Currently, these features include *Community Collections* (sets or "playlists" of resources on the platform curated by local individuals or "authors"), *Community Shelves* (sets of resources that have been curated by organizations to provide a dedicated curriculum for their constituents), and *Live and Learns* (short pieces on South Bend residents and organizations describing their Bendable experience). Finally, Bendable aims to stimulate depth of learning through in-person learning opportunities and working within organizations (e.g., employers, community organizations) to provide critical support to learners. Though the initiative is universal for all residents, it is "focused, above all, on reaching those in the community who have been most underserved."[10]

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*"Bendable isn't going to solve poverty. It isn't going to solve structural racism. It isn't going to solve anything in one fell swoop. But, it can be a **part of a powerful set of solutions** that communities need to try, and provide **easy and almost radical access to resources**."*

- Rick Wartzman, Drucker Institute, ["How Community Plays a Critical Role in Fostering Lifelong Learning"](#) (*Forbes*, September 2020)

Roles of Key Institutions

Initially, the Drucker Institute, a nonprofit social enterprise based out of Claremont Graduate University, worked in close partnership with IDEO on the design and development of Bendable. As the work progressed and a need for both on-the-ground and satellite support was more clearly defined, the group launched **the Hub team**, a five-person team made up of Rick Wartzman (Drucker Institute), Sarah Zaner (formerly with IDEO), Lex Dennis (formerly with enFocus, South Bend resident), Fred Teague (consultant, South Bend resident), and Lawrence Greenspun (Drucker Institute, South Bend resident). This team is

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[10] Drucker Institute, Claremont Graduate University. (Fall 2020). "About Bendable."

tasked with the day-to-day operations of Bendable, working in collaboration with the Library and other key stakeholders.

The **St. Joseph County Public Library (SJCPL or the Library)** is Bendable's anchor institution in South Bend. Initially, former South Bend Mayor Pete Buttigieg suggested that the Hub collaborate with the Library given the institution's positioning, relationships, and stability within the community. The Hub collaborated with several Library stakeholders in Bendable's early design and development, including Jenni Henecke, Communications Manager at SJCPL, who became a champion of Bendable and a close partner. In addition, the Library hired Norah Alwalan, Marketing Specialist at SJCPL, to serve as a dedicated Library staff member on Bendable. Jenni and Norah are currently leading the implementation of Bendable in South Bend, and work with the Hub on a daily basis to develop and build engagement on the platform.

Bendable's Design and Development

The Hub conceived Bendable based on the idea to create a system to support a city of lifelong learning. In the fall of 2017, the Hub had its first meeting with then Mayor Pete Buttigieg to discuss what it would mean for South Bend to be a city of lifelong learning. There were two important outcomes of this meeting: first, the City of South Bend became a close partner, supporter, and advocate for Bendable and, second, Mayor Pete suggested the Library as the local anchor institution for the initiative, as noted above.

In 2018, after gaining this initial support from the Mayor's Office, the Hub began an extensive process to understand and gather input from the South Bend community through more than 2,200 interviews. These interviews with community members, led by the Hub team and IDEO, informed Bendable's design and development from 2018 to early 2020. Through the design and development process, the Hub team expanded its size and also established and built relationships with key stakeholders, including City officials and agencies, schools, community-based organizations, religious institutions, employers, and other local groups.

On April 13, 2020, the Hub launched a beta version of Bendable and conducted a Bendable beta test to collect input from community members, Library staff, teachers, and other Bendable partners. Designed to help the Hub understand how the platform was performing and how users were experiencing the content and resources, the beta test garnered participation from over 100 users, with content and feature testing conducted for 1,200+ resources. Feedback on the user experience, content, platform features, and outreach and engagement directly informed refinements to Bendable's design ahead of its launch in June 2020. For example, users commented on the language used to explain some of the features, describing it as "fancy" and suggesting more clarity and simplicity. The Hub team took this feedback and incorporated clearer language throughout its communications.

Bendable was launched virtually in South Bend on June 5, 2020 in partnership with the Library and with support from the City of South Bend.

COVID-19 Context

The Hub originally planned for an in-person launch at South Bend's annual festival "Best. Week. Ever." in June 2020. In late 2019, the COVID-19 virus began spreading around the globe. In March 2020, just as Bendable's beta design was being finalized, cities and states throughout the U.S. began entering into lockdown to slow the spread of the virus, including the city of South Bend on March 19, 2020. The lockdown put in jeopardy Bendable's planned in-person launch in addition to the in-person learning opportunities that are an essential component of Bendable's lifelong learning system. In the days immediately following the city's lockdown, the Hub team made a quick decision to pivot to a virtual launch targeted for the same timeframe – early June 2020. As a result of the COVID-19 pandemic, Bendable was launched and is being implemented almost exclusively in a virtual environment.

The impact of COVID has extended beyond launch, substantially limiting the in-person engagement that the Hub had initially depended on to build and sustain reach and engagement. Physical locations such as library branches and community centers were intended to serve as places for generating, building, and sustaining organic engagement on the platform with patrons, clients, and the public. In the context of COVID, those centers have had to drastically lower the number of people that are permitted into their buildings and can access resources. In addition, library branches and community centers have been responsive and shifted the types of support they provide, with an increasing number of individuals looking for support with basic needs, including accessing social services and applying for government support. The Hub and the Library have had to adapt all aspects of their work to meet people where they are in the context of the pandemic and the associated lockdowns and social distancing.

Limited in-person engagement also affected the data collection plans for this evaluation. For example, the original evaluation plan included collecting user feedback through in-person surveys and interviews (e.g., administered by Library staff in SJCPL branches). Instead, user feedback was collected through an online user survey disseminated via the Library's email listserv to all Library patrons.

History of South Bend

As a lifelong learning platform designed for the city of South Bend, central to Bendable's design, content, and goals is the intent for it to be radically accessible, relevant, and useful to all residents, "aimed primarily at lifting up the most under-served and economically vulnerable."[11] Because Bendable's ultimate goal is to build the economic and social resilience of the entire South Bend community, it is important to understand the city's local history and demographics, and to take these into consideration while reviewing the findings and implications for centering equity in implementation.

South Bend's early history was marked by the forced displacement of Native peoples and the arrival of new migrants. Rising industrialization through the 19th century contributed to early-20th century prosperity. In the early to mid-20th century, African American and Latinx populations grew in South Bend and experienced systemic racism in the form of segregation, redlining, and other discriminatory policies. Massive economic decline in the 1950s and 1960s resulted in substantial population loss. These
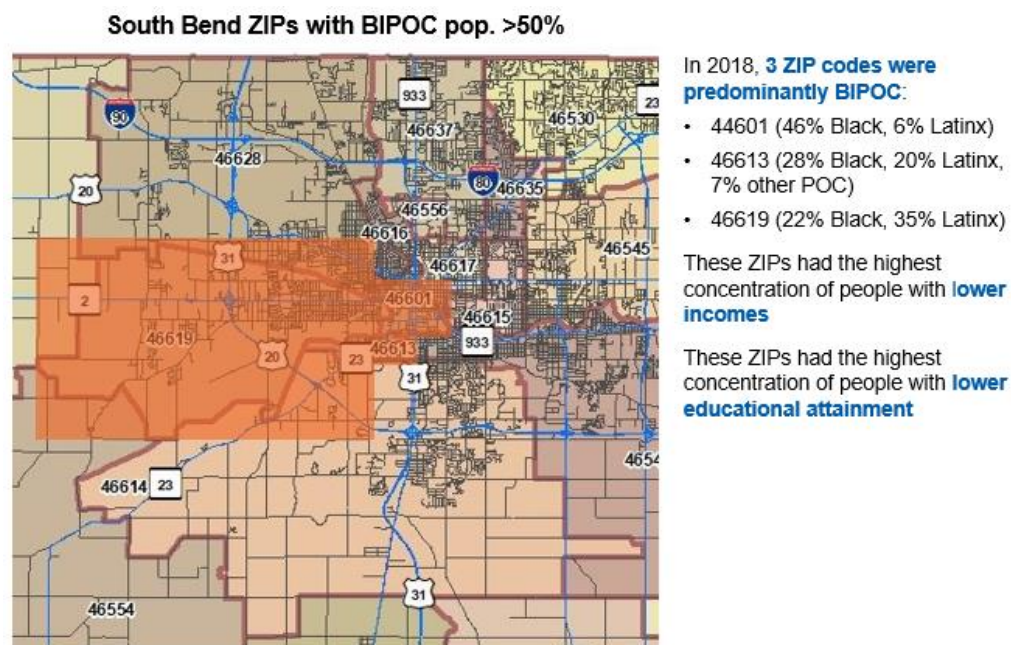
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[11] Drucker Institute, Claremont Graduate University. (Spring 2019). "South Bend Lifelong Learning System: Forging resilience through Learning."

demographic shifts continued into the 1980s and 1990s with an influx of Latinx populations, primarily for industrial and service jobs, and White flight to suburban areas.[12]

Local and National Impacts of Systemic Racism

Systemic racism in South Bend's history continues to impact residents today, demonstrated by recent incidents of police brutality, discrimination against Black community leaders, and the presence of White supremacist hate groups.[13] The local population remains clustered into different ZIP codes (ZIPs) by race, age, income, and educational attainment, demonstrating the intersectionality of these demographic variables. As is true for most U.S. cities, Black Indigenous People of Color (BIPOC) – and most acutely African American residents – disproportionately experience disparities in wealth in South Bend. While South Bend is predominantly White, BIPOC continue to experience the highest rates of income and educational inequities disproportionate to the total number of BIPOC residents:[14]

Figure B. Map of South Bend ZIPs with greater than 50% concentration of BIPOC populations

South Bend ZIPs with BIPOC pop. >50%

In 2018, **3 ZIP codes were predominantly BIPOC:**
- 44601 (46% Black, 6% Latinx)
- 46613 (28% Black, 20% Latinx, 7% other POC)
- 46619 (22% Black, 35% Latinx)

These ZIPs had the highest concentration of people with **lower incomes**

These ZIPs had the highest concentration of people with **lower educational attainment**

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[12] Sources: "America's Dying Cities." Newsweek, 2011; "Civil Rights in South Bend's History." St. Joseph County Public Library; "Early St. Joseph County History." The History Museum; "Ethnic Transitions between Poles and Mexicans." Institute for Latino Studies, University of Notre Dame, 2008; "Immigrants, cars, cities, and a new Indiana" in *Hoosiers and the American Story*, 2014; "Local African American History." The History Museum; "Neighbors talk racism in South Bend." ABC57, 2017; "Racial Wealth Divide in South Bend." Prosperity Now, 2017; "South Bend: Reinventing a 'Dying City.'" New America, n.d.; "South Bend's history seen in five periods of settlement." South Bend Tribune, 2015; "THH Episode 21: From Redlining to Better Homes: The Better Homes of South Bend Housing Cooperative." Indiana Historical Bureau of the Indiana State Library, 2019.

[13] Southern Poverty Law Center.

[14] 2011, 2014, and 2018 ZIP code data from the U.S. Census.

Figure C. Map of South Bend ZIPs with greater than two-thirds (67%) concentration of White residents

South Bend ZIPs with White Residents >67%

In 2018, **White residents made up over two-thirds (67%) of the population in 5 ZIPs**: 46614, 46615, 46617, 46635, 46637

4 of these ZIPs have the highest concentration of people with **higher incomes**

These ZIPs have the highest concentration of people with **higher educational attainment**

These ZIPs also tend to be where the **percentage of BIPOC populations is the lowest** across geographies

Furthermore, South Bend and communities across the country continue to contend with systemic racism and police brutality following the recent murders of George Floyd, Breonna Taylor, and Ahmaud Arbery, and the police shooting of Jacob Blake.

Section II: Findings from Bendable's Early Implementation

Analytics from the first six months of Bendable's launch and implementation (June 5 to November 30, 2020)[15] indicate that the lifelong learning platform has been successful in its launch and early implementation in reaching and engaging people in South Bend. This section describes the key outcomes that demonstrate Bendable's early uptake in South Bend, as well as key evaluative learnings from the pre- and post-launch periods. The evaluation findings are organized by six factors that are contributing to and enabling Bendable's early success: community buy-in, marketing and outreach, community engagement, user experience, the Hub team, and the Library.

Figure D. Link between the key outcomes demonstrating success and the underlying factors enabling that success

Indicators of Success
What outcomes demonstrate the success of Bendable's launch and early implementation?

Success Factors
What underlying factors are contributing to and enabling the success of Bendable's launch and early implementation?
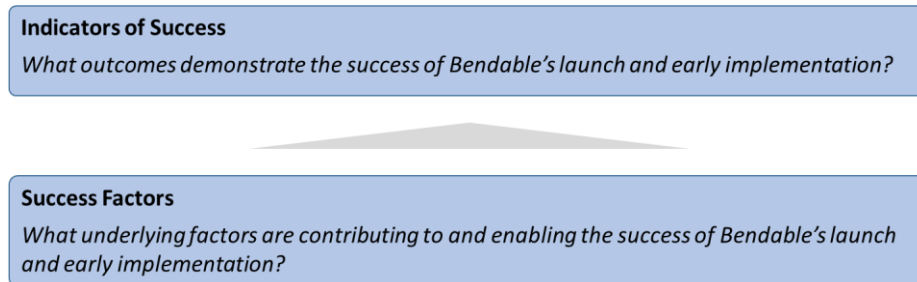
Indicators of Bendable's Successful Launch and Early Implementation

As of November 30, 2020, Bendable had reached 10,881 visitors in the Greater South Bend area and garnered 1,061 account sign-ups. While there is no direct comparison for Bendable and, therefore, no direct metric to benchmark Bendable's success, we believe that the launch has been successful, for a number of reasons. **First, user engagement metrics indicate that Bendable continues to have a steady stream of visitors from the Greater South Bend area**:

Figure E. Summary of Bendable visitors as of December 3, 2020

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[15] See Appendix E: Bendable Weekly Dashboard – November 27 to December 3, 2020 and Appendix F: Bendable Monthly Dashboard – November 2020.

Second, there is broad engagement throughout South Bend. Residents from a diverse set of ZIP codes in the Greater South Bend area are signing up on the platform, and particularly residents in geographies that are predominantly BIPOC (highlighted in orange in Table 2). As of November 30, 2020, out of 1,061 total account sign-ups, the Hub had garnered over 227 sign-ups (21%) from the three ZIP codes in South Bend (46601, 46613, and 46619; highlighted below) that are predominantly made up of communities of color.[16]

Table 2. Bendable accounts created by ZIP code (Greater South Bend area), as of November 30, 2020

Accounts Created by ZIP code			Accounts Created by ZIP code (continued)		
Greater South Bend ZIP Code (pop. size)	Population size	To-date (% change since last month)	Greater South Bend ZIP Code (pop. size)	Population size	To-date (% change since last month)
46614	30,647	119 (+8%)	46556	7,269	5 (+0%)
46628	27,159	109 (+4%)	46536	N/A	3 (+50%)
46601	6,004	92 (+8%)	46563	23,820	2 (+0%)
46617	9,422	84 (+5%)	46506	N/A	1 (+0%)
46619	21,775	84 (+14%)	46514	N/A	1 (+0%)
46615	12,919	69 (+3%)	46517	N/A	1 (+0%)
46530	31,593	59 (+9%)	46546	N/A	1 (+0%)
46637	15,251	55 (+2%)	46552	6,846	1 (+0%)
46613	10,980	51 (+2%)	46680	N/A	1 (+0%)
46616	5,654	40 (+8%)	49120	N/A	1 (+0%)
46545	24,871	32 (+39%)	Library card holders with no ZIP code		105 (+46%)
46544	31,359	29 (+21%)	Demo users outside of South Bend		71 (+1%)
46635	6,901	22 (+10%)	Total Accounts Created		1,061 (+19%)
46554	4,963	10 (+11%)			
46561	13,593	7 (+17%)			
46574	9,369	6 (+20%)			

Third, an indicator of Bendable's early success has been its reach and integration with organizations and stakeholders in South Bend. As one Library staff said, "We have succeeded in terms of [beginning the process of] community integration, being able to access pretty much every nonprofit in town, and pushing Bendable to every organization."

Factors Enabling Bendable's Early Success

In order to embed Bendable into the city of South Bend, the Hub took a systematic approach to the design, launch, and implementation of the platform. Six factors contributed to Bendable's success. Four of these factors describe areas of activity that influenced uptake of the lifelong learning platform: (1) building **community buy-in**; (2) conducting **marketing and outreach**; (3) focusing on **engagement of**

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[16] Bendable does not currently collect more specific demographic information (e.g., age, gender, race / ethnicity, educational attainment). In the absence of additional demographic data on Bendable users, the Hub and Library teams are using ZIP codes as a proxy for demographic information, recognizing that ZIP codes alone are insufficient to determine user demographics.

community members and organizations, for input as well as to provider learner support; and (4) creating meaningful **user experiences** that increase retention and continued engagement on the platform. Cutting across each of these areas of activity is the (5) **Hub** and (6) **Library** teams' structure and culture, which have been central to Bendable's implementation and success in advancing use of the platform.

Figure F. Six factors influencing Bendable's uptake in South Bend
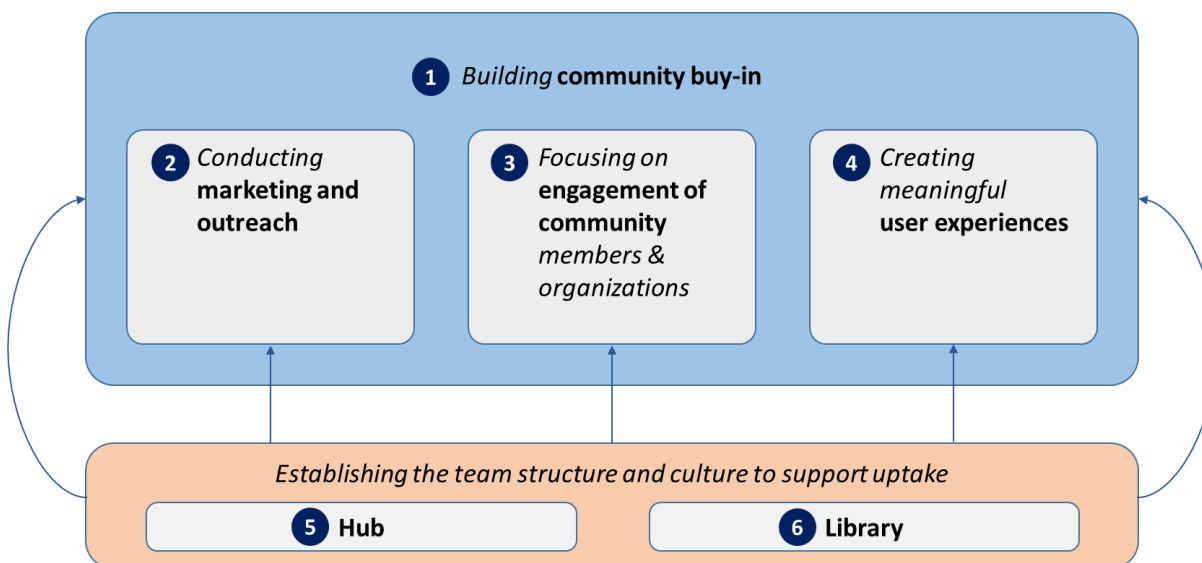
These six factors influence Bendable's uptake in South Bend; but, the aim of the Hub and Library is not just to increase usage of the platform. Rather, the focus is to support a depth of learning for users, indicated by residents acquiring new knowledge and skills that, overtime, will lead to the broader economic and community resiliency outcomes of Bendable (i.e., higher wages and better jobs, more satisfied employers, and greater well-being across the community).

The following section describes some of these activities and highlights the evaluative findings for each success factor.

Table 3. Summary of evaluative findings from Bendable's early implementation, organized by success factor.

Key Findings

Community Buy-in
1. Relationships have been central to building trust and engagement with Bendable.
2. The Hub intentionally invested staff resources to support building community buy-in.
3. True to its goals, Bendable has been designed and implemented for and by the people of South Bend.
4. The Hub is sustaining community buy-in through the continuous flow of information to and from community members, which will continue to be essential for Bendable's growth and sustainability.

5. The Hub has had to balance speed and efficiency in design and implementation with the time and space necessary to gather and incorporate feedback, including considering partner priorities and equity implications.

Marketing and Outreach
1. Bendable has succeeded in reaching and engaging people in South Bend during the first six months since launch.
2. The Hub and Library have effectively adapted marketing and outreach efforts to the uncertain and dynamic context of the COVID-19 pandemic.
3. While residents are hearing about Bendable, there are differing and additional notions of what Bendable is and could be.
4. Accessibility continues to be a challenge that outreach efforts alone cannot solve.

Community Engagement
1. The Hub and Library have increasingly focused on partner organizations as the key strategy for building and scaling user engagement.
2. The Hub and Library made specific efforts to reach underserved populations – particularly communities of color and low-income communities.

User Experience
1. Designing and adapting Bendable to reflect the community's makeup, interests, and needs increases the likelihood that users will engage with the content and return to the platform.
2. Building and sustaining user engagement takes time: it is still early in Bendable's implementation, and the current pandemic context has unexpectedly limited awareness and in-person engagement.

Hub Team
1. The Hub team's structure and culture the team has developed contributes to Bendable's success.
2. Central to the Hub's culture and approach has been an intentionality to be inclusive, responsive, and adaptive in Bendable's design and implementation.

Role of the Library
1. The Hub's partnership with the Library has been critical to Bendable's successful design and implementation.
2. The Library and Hub have effectively worked through challenges related to workstyle, pace, and expectations.
3. The Library has assumed the role of the core owner and implementer of Bendable, which is more likely to support Bendable's sustainability and ability to achieve its long-term goals.

Findings Related to Community Buy-in

"Buy-in" is defined as the "acceptance of and willingness to actively support and participate in something."[17] From the outset, the Hub and its partners were explicit that Bendable's success would be contingent upon its ability to gain buy-in from South Bend residents, community organizations, and institutions.

The Hub's relationship-building efforts started nearly three years ago, as the initiative was being conceptualized. In 2018, Hub team member Lawrence Greenspun and IDEO conducted over 2,200 interviews with community members that informed Bendable's initial design and laid the groundwork for implementation. Through ongoing 1:1 and group meetings, the Hub invested in developing relationships with key stakeholders, including city officials and agencies, teachers, community-based organizations, religious institutions, employers, and other local groups who could embed the platform into their own organizations, serve as ambassadors for Bendable throughout the city, and reach specific communities and groups. In April 2020, the Hub conducted a Bendable beta test to collect input from over 100 users including community members, Library staff, teachers, and other Bendable partners in advance of launch. Post-launch, the Hub has continued to listen to the needs and interests of community members and has adapted Bendable based on their feedback and the changing needs of the community. Recurring meetings with key stakeholders including partner organizations and institutions have created forums to share their experiences integrating the platform into their organizational practices.

The following efforts have substantially supported the ways in which community buy-in and input have been successful.

1. **Relationships have been central to building trust and engagement with Bendable.** The Hub's deep investment in relationships with individuals, organizations, and institutions both in and outside of South Bend have laid the groundwork for integrating Bendable into the community. As one Hub team member explained, "Bendable was only going to stand if it was centered on people and relationships." One Library staff member likewise noted the value Hub team members have brought through the relationships they have built: "I don't see how any of the stuff that we achieved could have been achieved without having Fred, Lex, and Lawrence reaching out to different parts of the community. Being able to access those communities through the Hub team has been invaluable."

   "Bendable was only going to stand if it was **centered on people** *and relationships."*
   - Hub team member

   From the beginning, the Hub took an inclusive approach to building community buy-in, taking the time to talk to anyone who was interested in lifelong learning, pursuing all leads, listening to the needs of community members, while also ensuring that they reached specific individuals and groups, particularly from marginalized communities. In these formative conversations and meetings,

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[17] Source: Merriam-Webster.

the Hub conveyed that Bendable was for the people of South Bend. As one Hub team member explained, "One of my goals was always to make any individual I talked to feel that they were as important as the city government of South Bend or [the University of] Notre Dame. It was important to get that message out there that this isn't about the big shots. This is about you." As another Hub team member described, "It was important that the underserved or the forgotten, the have-nots, have a voice at the table. It wasn't like because you're United Way, we're going to have a two-hour meeting with them and then I'm going to go down to Hope Ministry and I'm going to talk for 20 minutes. No, I'm going to spend as much time answering questions, getting to know the people, making sure they fully understood that there was no ulterior motive other than wanting to see them do better."

2. **The Hub intentionally invested staff resources to support building community buy-in.** Having dedicated staff with established, local connections supported this relationship-building by serving as a bridge and liaison to the community. One Hub team member explained that Bendable needed staff who were local, networked, and a "champion" who could "open doors" to other key stakeholders in the city. Because Bendable relies on its collaborations across sectors, communities, organizations, and stakeholders to advance lifelong learning and community resilience, that local champion needed to facilitate these critical connections. In addition, many stakeholders noted that, despite having staff members not originally from South Bend, the team has quickly built respect, trust, and credibility in the local community.

    In this way, through an investment of time, staff, and resources in cultivating these relationships, the Hub, in partnership with the Library, built trust with community members and organizations. This trust was critical not only in ensuring an on-time launch in early June, but also in enabling the rollout of new features on the platform. For example, one Hub team member reflected on a community partner implementing a new feature with their employees: "Goodwill felt comfortable talking to us about building a *Community Shelf* for her 37 clients because we've been talking to them about Bendable for two years. [Our contact] has been to 10 meetings with Lex and Lawrence." Through this trust and relationship building, Bendable is being "integrated into the community" in South Bend.

3. **True to its goals, Bendable has been designed and implemented for and by the people of South Bend.** The Hub and Library have implemented features designed to make Bendable feel local. For example, Bendable's *Community Collections* are curated sets of resources that are "authored" by community members. With the authors' names and photographs displayed, users and stakeholders have commended the *Community Collections* and the fact they have recognized the individuals featured. One *Community Collection* author praised this feature on Bendable as highlighting resources and individuals in South Bend that residents might not be aware of. In addition, one community member commented: "I enjoyed the local component. It's nice to know the information is coming from real people in the community and pointing toward local organizations." In addition to the *Community Collection* feature itself, a *Community Collection* author praised the experience of working with the Hub to create the collection, highlighting as an example having a community

member take professional photos of authors as a small but meaningful way to emphasize that Bendable was local.

This approach required a willingness to listen, learn, and pivot based on community input and feedback. As one Hub team member reflected: "I think there's an amount of humility and humbleness that needs to come with this [initiative]. When we go to a new city, this is not about saying that you don't have the pieces, the knowledge, the know-how, the expertise, or the passion, and this is not about saying that there aren't great efforts and initiatives in place. What it means to come on board to team Bendable, is to say I believe in this mission and I'm open to the way I'm doing my job changing somewhat so that I can amplify the effect that I'm trying to have on the people that I already am serving."

4. **The Hub is sustaining community buy-in through the continuous flow of information to and from community members, which will continue to be essential for Bendable's growth and sustainability.** For the Hub and Library, building community buy-in has been an ongoing process – one in which relationships need to be maintained, and input continually solicited and incorporated. Channels to share and receive information and feedback from community members have been important functions for maintaining trust while also informing Bendable's design and implementation. For example, the beta testing process was critical for the Hub to receive feedback from community members and stakeholders on the user experience of Bendable. Beta test users provided feedback on the extent to which the features, design, content, and feel of Bendable was relevant to and reflected the needs of the local community.

The beta testing process highlighted that while there was excitement and energy around using Bendable and embedding the platform within organizational practices, there were also financial, technological, educational, and language barriers to be considered that inhibited some groups – particularly communities of color, and exacerbated by COVID – from accessing and engaging with the platform. In the Hub's *Bendable Guide* training and capacity-building of partners to embed Bendable in their organizations, one stakeholder commented on the Hub's availability to meet with partners, and their openness to receiving feedback: "With the platform, everybody's kind of on a learning curve; but the willingness of Lex -- he came over and presented at least twice about Bendable. He keeps everybody on the same page of where we are, what's improving. And, they're always open for feedback."

In addition, the Hub has facilitated ongoing meetings with community organizations and residents to provide input into Bendable's design and implementation. For instance, the Hub held a focus group with community members from a Latinx-serving organization. In the focus group, community members suggested different features and approaches to engaging Latinx populations, but also

highlighted that the availability of content will not necessarily lead to engagement of this population. As a result, the Hub decided to reconvene and bring in additional community members to ensure that these features were designed for and by the communities that would be accessing them. For the Hub, the focus group was successful at engaging community members and organizations in conversation about Bendable's design. As one Hub team member explained: "I have no idea if we will actually see the needle move in terms of the number of users that we have in those ZIP codes that represent the Latinx community. But, the fact that La Casa is engaging in this way is super cool. I consider that success even long before we know the numbers of users in that ZIP code signing up on Bendable."

In the spirit of providing continuous feedback, several stakeholders suggested creating a comment box for users to provide feedback on the design and features of the platform. *Community Collection* authors suggested that the Hub and Library share user feedback with them to provide insight into the impact of the work they put in to creating their *Collections*, to inform their work moving forward, as well as to support their ongoing engagement with Bendable. In addition, one Hub team member wondered whether they should be bringing community members into meetings on an ongoing basis to provide feedback on design and implementation. Another Hub team member suggested additional focus or learning groups to provide input as Bendable continues to evolve, while another Hub team member imagined the establishment of a local Bendable Board where community members could have decision-making power over Bendable's design while also facilitating connections with other community members and organizations.

5. **The Hub has had to balance speed and efficiency in design and implementation with the time and space necessary to gather and incorporate feedback, including considering partner priorities and equity implications**. The Hub learned important lessons along the way regarding what it means to respectfully and authentically solicit and create opportunities for community input and engagement. For example, in the immediate wake of George Floyd's murder and a renewed national conversation around systemic racism and police brutality, the Hub reached out to community members to author *Community Collections* related to racism and restorative justice for Bendable, a few days ahead of launch. With the Hub's workstyle and orientation to build and design quickly, the immediacy of the Hub's outreach was received – according to authors, Hub team members, and Library staff – as lacking awareness and tokenizing. The Library responded to feedback from authors with recognition and apology. In addition, the Library played a critical role in pausing these efforts and jointly reflected with the Hub on how to engage authors and community members with greater understanding and awareness moving forward, as well as identifying and leveraging relationships with a diverse set of organizations and stakeholders in the process. The Hub and Library are increasingly attentive to building in time and space in processes and reevaluating based on feedback. For example, one idea explored over the summer was *Bendable Buddies* – a feature designed to form connections among users to foster mutual accountability for learning. The Hub and Library intentionally decided to pause on *Bendable Buddies* to focus more on providing learner support through partner organizations and to allow more time to better understand users before building out a new feature.

Findings Related to Marketing and Outreach

The Hub and Library understand – and continue to emphasize – that for the people of South Bend to use Bendable, residents would need to hear about the platform multiple times through multiple channels over time, especially given the nearly all-virtual environment. The Hub employed a multi-pronged outreach strategy[18] to seed interest in and engagement with the Bendable platform at three levels.

Table 4. Overview of the Hub and Library's multi-pronged marketing and outreach approach

1. Mass Marketing	The Hub invested in an outreach campaign with Kilter, the Drucker Institute's marketing partner, to co-develop an outreach and communications plan with the Library, and to explore channels to reach South Bend residents. The campaign was extensive and multimodal, including advertisements on TV, radio, the local newspaper, social media, content providers' platforms, and the Drucker website.
2. Institutional Outreach	The Hub leveraged its partnerships with the City and the Library to spread the word about Bendable. The Hub and Library disseminated 40,000 flyers via City water bills at launch in June, and inserted additional flyers in free park lunches distributed to residents on a daily basis during the summer. The Library included information about Bendable in its weekly newsletters to its network of 40,000 patrons, social media posts, and in staff engagement with patrons at local branches. In addition, the Hub and Library regularly engaged community-based organizations, employers, and other stakeholders to build awareness of Bendable within their organizations and to brainstorm creative approaches to getting the word out. To-date, the Hub and Library have engaged 58 organizations in outreach activities such as including messages about Bendable in their materials and ongoing communications to the communities and clients they serve.
3. Direct / On-the-ground Outreach	The Hub and Library disseminated digital and in-person materials about Bendable, purchased a billboard advertisement, and disseminated information about Bendable in grocery and store checkout bags. To-date, the Hub and Library have disseminated 3,600 flyers at various locations, including low-income communities, senior living facilities, schools, and community services centers. In addition, the Library has distributed Bendable flyers at in-person events and at Library branches.

The following describes key findings regarding these marketing and outreach activities.

1. **Bendable has succeeded in reaching and engaging people in South Bend during the first six months since launch.** While there is no comparable place-based platform offering the suite of

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[18] See Appendix D: Marketing and Outreach Summary.

virtual and in-person learning resources that Bendable offers, given the outreach and engagement data outlined above, it is clear that, in its first few months since launch, Bendable has been successful in reaching and engaging people in South Bend. Given a lack of benchmarks, the Hub and Library recognized that numbers alone were insufficient indicators of success, and expanded this definition to encompass user engagement and retention on the platform, learning facilitated by partner organizations, and qualitative feedback from community members about the platform. Through user and content provider metrics, interviews, surveys, and feedback from community members, it is clear that people in South Bend are hearing about Bendable, visiting the platform, and spending time exploring its content and features. For example, among respondents to a user survey disseminated to the Library's network, among the over 500 respondents to the survey, 38% had heard about Bendable. Nevertheless, there is an ongoing need to ensure access to Bendable for communities facing disproportionate barriers – namely communities of color and low-income communities.

2. **The Hub and Library have effectively adapted marketing and outreach efforts to the uncertain and dynamic context of the COVID-19 pandemic.** While the Hub and Library had planned on leveraging in-person events to build awareness about, and engagement with Bendable, the pandemic thwarted many of these activities. The Hub had to adapt quickly, and piggybacked their efforts with other events, distributing flyers, connecting with individuals and organizations online, and formally and informally spreading the word in as many places as possible. In fact, as one Library team member explained, the pandemic context created opportunities that may not have existed otherwise: "We were able to get people's attention at a time when you wouldn't think it would have been possible because we are in the middle of a pandemic and everyone is in crisis mode. We were able to provide an outlet and an opportunity that was very specific to the moment and also the ease with which you can communicate virtually." The Hub and Library teams' agility in the context of a pandemic was supported by the collaborative and self-described "scrappy" orientation of both teams, where team members trusted one another to lead in different areas of the work and supported one another in all aspects of the platform's design and implementation. This workstyle has lent itself well to the multi-pronged marketing approach, where the Hub has simultaneously been able to conduct outreach at the mass-market level while developing and leveraging relationships at the institutional and grassroots levels to spread the word about Bendable. For example, as a result of building buy-in with partner organizations, several organizations are planning to conduct their own outreach related to Bendable through events, community leader communications, and having Bendable information and resources available at physical locations. In addition, the Hub and Library continue to actively use analytics to inform ongoing decision-making, curate content to meet the evolving needs of the South Bend community, and add specific transition programs based on what is needed to reach and engage all South Bend residents.

3. **While residents are hearing about Bendable, there are differing and additional notions of what Bendable is and could be.** Some stakeholders described a hope that the platform would develop into a job board; others saw opportunities for Bendable to centralize services and resources for basic needs. In addition, several stakeholders highlighted an opportunity to refine Bendable's value

proposition to users. As one stakeholder suggested, "It has to be something tangible at the end of this. My clients are going to say, 'If I do this [Bendable], will I get a job? Can you guarantee I'll get an interview?" Though the Hub has consistently described Bendable as a learning platform, and not a job-matching or community information platform, there is a continued need to clarify its messaging to draw users to the platform.

4. **Accessibility continues to be a challenge that outreach efforts alone cannot solve.** While Bendable is designed to be inclusive of all people in South Bend, stakeholders highlighted a lack of access to digital technology and skill-building – particularly among low-income populations and older adults. In addition, South Bend's digital divide is exacerbated in the current context with the Library and other public spaces being closed due to COVID-19. As one community stakeholder explained, "If you're going to have an online resource, there's a group that's realistically going to be left out in the population: it is people who aren't comfortable using the computer or who don't have one at home, they don't have internet, they're depending on all of that to come from the Library… Bendable can't fix our digital divide."

Findings Related to Community Engagement

Engaging community members and organizations in efforts to integrate Bendable has been key to the Hub's strategy to catalyze user engagement on Bendable and, therefore, lifelong learning. The Hub and Library teams are seeking input from residents and organizations, and see community engagement as a key piece to a long-term strategy and process for learner support to increase depth of learning for users.

> *"What we're actually doing is coming into communities and cities, and we're providing this service of activating them to rally around lifelong learning and this idea of building resilience in a city. Bendable…is just the thing that brings everybody to the table."*
>
> - Hub team member

While the Bendable platform is designed to reflect the needs and interests of the people of South Bend, the Hub, Library, and other stakeholders agree that what really influences behavior change in support of lifelong learning is the engagement strategy of the platform. As one Hub team member explained: "The product that we have with Bendable is the leave-behind. What we're actually doing is coming into communities and cities, and we're providing this service of activating them to rally around lifelong learning and this idea of building resilience in a city. Bendable the program or Bendable the product is just the thing that brings everybody to the table." Another Hub team member echoed this sentiment, explaining, "Bendable is not a silver bullet," but rather it is "part of a set of solutions that are dealing with systemic issues." Bendable depends on the partnerships, collaboration, aligned initiatives, and coalitions that surround it to serve the community and achieve its goals.

There are two key findings on the Hub's community engagement activities and how they are linked to catalyzing user uptake.

1. **The Hub and Library have increasingly focused on partner organizations as the key strategy for building and scaling user engagement.** The Hub views relationships with key stakeholder organizations as critical to building sustained engagement through the idea of "supported learning," where Bendable is embedded in an organization's learning and development processes. For example, through Bendable Guide trainings, the Hub equipped Library branch managers, Goodwill case managers, teachers, and other organizational leaders with information about Bendable to share with patrons, clients, and their communities. These trainings were designed to provide partners with a thorough understanding of the navigation and features of Bendable to help partners actively engage with the people they serve. When Goodwill case managers talk with their clients about accessing social services, they mention Bendable as a potential resource. In addition, Library staff dedicated to Bendable have facilitated engagement and sign-ups at Library events.

   The Hub also applied tailored approaches in working with partner organizations to build engagement on the platform. The Hub has already established or is in the process of developing 11 partnerships to-date to integrate Bendable into learning and development (L&D) practices. For example, the Hub worked with organizations like Beacon Health System to develop a curriculum on Bendable curated to the professional development and upskilling needs of Beacon's employees. Additionally, the Hub and the City's Venues Parks and Arts Youth Jobs Initiative developed a weekly curriculum using Bendable for the at-risk youth the initiative serves, compensating participants for the time they spend learning.

2. **The Hub and Library made specific efforts to reach underserved populations – particularly communities of color and low-income communities.** While organizations and institutions are one lever by which people learn about Bendable, there is also a need to meet people where they are: "There are a whole bunch of people who never touch base with big employers or big organizations. That's the majority of the community probably, and unless we have a process of going out and meeting people where they are and talking to them, there are a lot of people that will never even hear about Bendable." As part of the targeted efforts to reach specific communities, the Hub met with organizations with strong relationships with specific communities to learn about how it could engage communities with cultural humility. For example, prior to launch, the Hub met with local faith-based organizations including the Kingdom Christian Center Church, Mt. Carmel Missionary Baptist Church, Sinai Synagogue, and the South Bend Church of God. These meetings informed the Hub's relationship-building and outreach with specific communities, and the organizations communicated information about Bendable to their congregations and communities served.

Findings Related to User Experience

In order to increase user retention and build the habit of learning, the Hub has focused on creating a meaningful and memorable user experience. Mid-way through Bendable's early implementation, and in

response to a series of learning conversations, the Hub developed a revised Theory of Change[19] to track and better understand the user experience and, ultimately, to refine what Bendable is and is not. In this process, the Hub identified four areas in which it would collect data on learning and engagement. These categories are now used to organize the user engagement and content provider metrics in the monthly dashboards that the Hub develops for its own learning.

Table 5. Monthly dashboard categories for data collection and tracking

1	*Activating learning*	The Hub seeks to avoid the pitfalls of users "window shopping" on Bendable by building a user experience and content discovery approach embedding trust and a sense of belonging and agency. The Hub aims to create an experience where users would arrive at a content partner site "ready to learn."
2	*Driving a depth of learning*	By engaging community partners and integrating Bendable into their organizational practices and how they serve their constituents (e.g., clients, students, and employees), the Hub seeks to ensure that learning paths are relevant and learning goals are reached.
3	*Cultivating the habit of learning*	The Hub encourages persistence and sustained user engagement in the difficult process of learning, tracking users who return to the platform and engage with partner content.
4	*Ensuring inclusion across the community*	With the goal of including the entire South Bend community to forge a "city of lifelong learning," the Hub is tracking engagement by geography to understand where and in which communities, greater focus and support is needed.

The following findings highlight learnings from the Hub and Library's efforts to provide user experiences that increase engagement and retention.

1. **Designing and adapting Bendable to reflect the community's makeup, interests, and needs increases the likelihood that users will engage with the content and return to the platform.** The Hub and Library have learned that truly making the platform feel "by" the people of South Bend, requires integrating Bendable into the community. The Hub and Library have developed features such as the *Community Collections* and *Community Shelves* to create channels for residents to curate content that is most relevant to their interests and needs. *Community Collections* provide an opportunity for community members to contribute directly to the content

> *"We want to **make people feel like they own** [Bendable]."*
> - Library staff

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[19] See Appendix B: Bendable Theory of Change – Updated October 2020.

featured on Bendable, and for residents to recognize people they know, which might increase the level of trust they have in the platform. In addition, *Community Shelves* provide a personalized space and "home" for organizations and institutions embedding Bendable into their L&D practices to house relevant resources. The Hub and Library also developed *Live and Learns* as another feature where community members can recognize familiar faces to reflect that the platform is for and by the people of South Bend.

One Library staff member described Bendable more than "just a passive resource": it is a platform that requires a mindset shift. Bendable's value-add is that it can spark a dialogue about how to meet someone's needs. Because it is designed to be by and for the people of South Bend, Bendable is adaptable. "We want to make people feel like they own it. If there's something missing, if there's a problem that they are seeing in the community, they can use Bendable as a tool to fix it, they can change what is on Bendable to do that."

2. **Building and sustaining user engagement takes time: it is still early in Bendable's implementation, and the current pandemic context has unexpectedly limited awareness and in-person engagement.** Given the wide range of activities that the Hub and its partners have supported, it is easy to forget that Bendable has only been implemented in South Bend for six months. With the time needed to institutionalize and embed a platform like Bendable, it is still very early in Bendable's implementation. In addition, the COVID-19 context has substantially inhibited Bendable from reaching its full potential. As one Library team member explained, the unexpected reliance on the virtual aspects of Bendable has highlighted both the value of the digital offerings as well as the potential for what Bendable can become when in-person engagement can occur. One stakeholder commented that the closure of key community organizations was a barrier to spreading the word about Bendable: "La Casa de Amistad, which is one of our partner sites that has computer access for the Latinx population of South Bend, is also closed... These nonprofit organizations that help people access computers are all closed right now, and that's how these individuals will access or hear about Bendable."

In spite of the lack of in-person engagement opportunities, Bendable has reached a significant number of people in the Greater South Bend area – though it is difficult and early to gauge the depth of user engagement and retention. Bendable had reached 10,881 visitors in the Greater South Bend area and garnered 1,061 account sign-ups, as of November 30, 2020. When in-person activities resume, it is anticipated that Bendable will see an even bigger increase in user engagement, especially as more time will have elapsed for organizations to adopt and engage with the platform. As part of the Hub's strategy to influence and encourage organizations to embed Bendable as part of their learning and development practices, partners conveyed that they are still in the process of integrating Bendable internally and gaining buy-in from their constituents (e.g., employees, clients, students) – emphasizing that organizational change takes time.

The Hub is exploring opportunities to increase user retention and depth of learning on Bendable, including engaging IDEO to brainstorm and develop new ideas to provide meaningful and memorable user experiences (e.g., *Bendable Buddies*).

Findings Related to the Hub Team

Bendable's success to-date is directly attributable to the Hub team and the ways in which the team supports each of the factors described above.

1. **The Hub team's structure and culture the team has developed contributes to Bendable's success**. The Hub has structured discrete roles and responsibilities for each of its five team members based on their distinct professional experiences and relationships. For example, Sarah Zaner's experience with IDEO made her a natural fit to lead the design and technical development of the platform. Fred Teague's connections and relationships with South Bend residents and community organizations have enabled him to champion Bendable in outreach and relationship development, and collect feedback as the "ears and eyes on the ground" in South Bend.

   In addition to team members living into their individual strengths and areas of expertise, as a collective, the Hub works collaboratively, and has built a culture where each person is leading specific work streams. As one Hub team member described it, "Our culture is we're collaborative. We talk all the time. There's nobody trying to claim credit or hoard information." Decision-making related to community relationships, outreach, engagement, and feature development also happens at both the individual and group levels, reflecting the trust that the team has in one another: "We make decisions as a group at times. But our team also has really smart, accomplished people, so we also make decisions ourselves individually."

2. **Central to the Hub's culture and approach has been an intentionality to be inclusive, responsive, and adaptive in Bendable's design and implementation**. Each of the Hub team members is guided by a commitment to making Bendable for and by the people of South Bend, with a recognition that their individual perspectives and lived experiences are often different from those of the people they intend to serve. There has been an increasing recognition within the Hub team on the importance of taking an intentional approach to understanding barriers to access, and how inequities disproportionately affect different populations in South Bend, especially communities of color and low-income communities. To support the advancement of equity considerations as part of the Bendable process, the FSG team developed an "equity guide"[20] that includes learning questions, principles, and practices to center equity throughout the process of developing, implementing, and scaling lifelong learning systems. The Hub team was receptive and enthusiastic about the guide and is beginning to implement a process to integrate these guidelines: the team plans to establish a regular cadence to revisit this document and discuss challenges and learnings in taking a more inclusive and equitable approach. As one Hub team member explained, "All of us on the Hub team

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[20] See Appendix G: Equity Principles & Practices for Scaling Bendable for the complete equity guide.

were already hooked into lifelong learning. We have a responsibility to make sure we're trying to experience [engage with] Bendable with other types of people, and seeing the challenges they face and don't face. We don't reflect the socioeconomic background of a lot of the target users." Another team member also described the Hub's approach to building greater inclusion:

> "There is something about the scrappiness of our team. It's not like we built the thing and launched, and now we're kind of taking a step back. We continue to question, are we hitting every community, and asking how can we bring in critiques of how Bendable is playing out so that we're hearing the different voices throughout the community? We're mostly taking the thing that we built and trying to bring people to it."

Findings Related to the Role of the Library

The Library has also played—and will continue to play—a critical role in Bendable's successful uptake within the Greater South Bend area, as highlighted by three evaluative findings.

1. **The Hub's partnership with the Library has been critical to Bendable's successful design and implementation.** From the beginning, the Library has served as the institutional backbone for implementing Bendable in South Bend. Without the Library's ownership, support, dedicated capacity, and activities, Bendable would not be where it is today. As one Hub team member explained, "You will not succeed in another city without the backbone organization, the public library, completely leaning into this with all its head and heart. To the degree we've had early success or are laying a decent foundation in South Bend, we owe that immensely to Jenni, Norah, Sarah, Deb, and all their frontline colleagues who have worked on this."

   Over the past few years of the partnership, the Hub has been intentional about supporting the Library to take on greater ownership of Bendable as implementation has progressed. The Hub has worked with and trained Norah Alwalan, the Library's Marketing Specialist dedicated to Bendable, to build the knowledge and skills necessary to sustain this work moving forward. As one Library staff member described, having dedicated capacity focused on Bendable has enabled the Library to "commit to Bendable and live and breathe it." In addition, the Library has engaged in ways that are not necessarily part of its "normal" functions. The Library has been heavily involved in much of the community outreach and learner support work; has put together a suite of Bendable resource guides; facilitated *Bendable Guide* trainings with organizational leaders to build their knowledge of and capacity to implement Bendable within their organizations; and collaborates weekly with the Hub in curating resources for the Bendable homepage. Above all, the Library serves as the public face of Bendable.

2. **The Library and Hub have effectively worked through challenges related to workstyle, pace, and expectations**. The Hub's start-up mentality and prioritization of efficiency and getting things done quickly has at times become a point of tension with the Library's more deliberate and calculated pace and workstyle. In addition, in entering into the partnership with the Library, the Hub was not

fully aware of the standards and expectations among libraries related to data privacy and confidentiality that limited the rollout of some features. As a few Library staff explained, "Libraries are the most trusted institution in the United States," and thus all decisions related to Bendable's design and implementation need to consider and maintain that community trust. Through this partnership, the Hub has had to learn how to adapt its expectations, timelines, and workstyle to support the Library and equip them with the resources necessary to own and manage Bendable. One Library staff member praised the way in which the Hub listens to what they have to say, respects their perspective, and is willing to engage in productive debate: "They're very good partners in that sense. They push us way past where we would go ourselves, and they respect our boundaries." In addition, the Hub and Library have also discovered the unique assets that they each bring to bear. As one Library staff member described, the Hub's access to financial resources enabled some activities that the Library would not otherwise have been capable of doing, such as printing and disseminating 100,000 flyers across the city.

3. **The Library has assumed the role of core owner and implementer of Bendable, which is more likely to support Bendable's sustainability and ability to achieve its long-term goals.** The Library has fully embraced and embedded Bendable as part of their regular activities. As one Library staff explained, "We don't really do Bendable. We are Bendable. We are what Bendable is and so every single thing about Bendable is something that the Library is doing." Moving forward, there are opportunities to build greater knowledge of Library staff to talk about and champion Bendable.

"We don't really do Bendable. We are Bendable."

\- Library staff

Section III: Implications for Scaling Lifelong Learning Systems

As Bendable continues to be implemented in South Bend and expands to other geographies, the Hub can reflect on several considerations to guide its activities moving forward.

Considerations for Ongoing Implementation in South Bend

These considerations reflect suggestions from Bendable stakeholders (e.g., Hub, Library, external partners, community stakeholders) as well as other implications based on the evaluation team's data collection, and are raised with respect to the ongoing implementation of Bendable in South Bend. Some of these reflect the current practice, with an acknowledgement to continue or advance the practice; others may note a different or new approach.

1. **Maintain and build additional feedback loops with community members and organizations.** Create opportunities for community input, especially from communities and groups that face disproportionate barriers to participation. As one Hub team member suggested, explore new opportunities to support community input and ownership such as a Bendable community board where residents can directly inform the platform's design and implementation. In addition, keep *Community Collection* authors apprised of user engagement with their *Collections*, and explore opportunities to re-engage authors beyond the initial *Collection* development process.

2. **Continue to evolve the content and design of the Bendable platform.** Use the feedback loops described above to ensure the platform's content and design is always fresh, updated, and reflective of the community. The Hub and Library teams are already implementing this practice, including having designed Bendable for the people of South Bend. For example, the Hub and Library have been intentional about curating content on Bendable to reflect the community's ongoing discussion and needs related to racism (e.g., the inclusion of a *Community Collection* on "Understanding the history of racism in South Bend"). It is important to keep this practice at the forefront of Bendable's continued implementation so the platform continues to remain dynamic and relevant as the learning needs of the community evolve. Doing so requires investment of time and resources for the Library (e.g., on how to maintain and update the technology) and looking for continued opportunities for community members to be involved in the design of the platform.

3. **Clarify – and potentially simplify – Bendable's value proposition.** There are different expectations and mental models of what Bendable is or could be. Most stakeholders understand that Bendable is a learning-matching platform, though some were initially confused that the platform is completely customizable to the specific learning and development needs of an organization. Other stakeholders (e.g., some employers, community organizations) are still looking for Bendable to be a job-matching platform. Several interviewees suggested simplified messaging and communications that provide clarity on exactly what Bendable is and is not. Clarity in communications can help reduce confusion, manage expectations, help users find more of themselves and their needs reflected in the platform, and, ultimately, improve the platform's use.
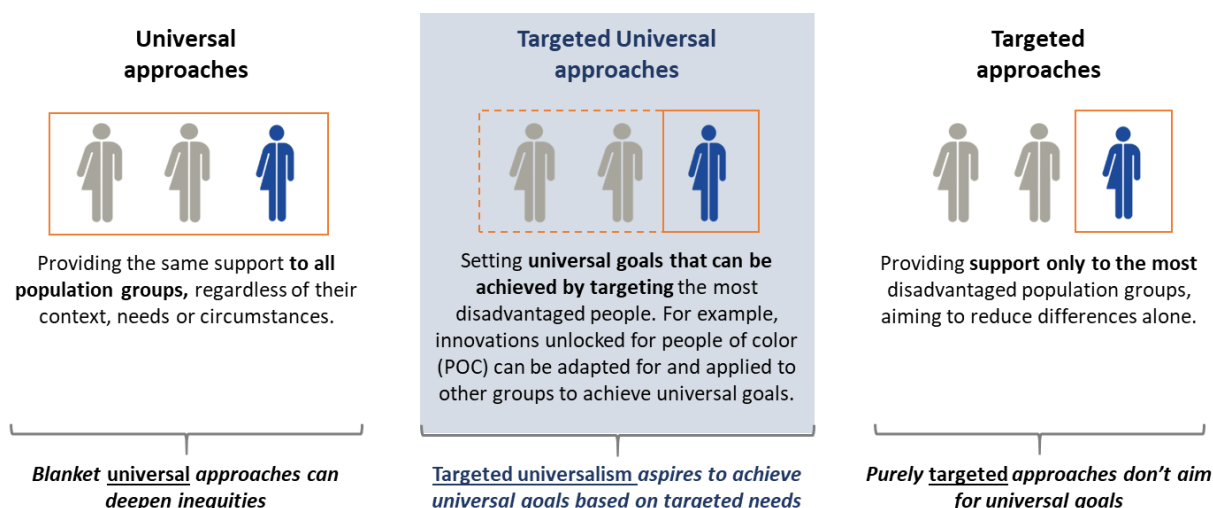
4. **Continue to adapt marketing and outreach strategies to meet the needs of specific communities.** Building on the Hub and Library's shift from being more mass-marketing driven to a targeted, localized marketing approach, the team should continue to think about who Bendable is reaching, how it reaches them, and adapting strategies to meet the needs of specific communities. Keeping a keen eye on the ZIP code metrics in the monthly and quarterly dashboards will help the team understand who the platform is and is not reaching. Collecting additional demographic data and disaggregating analytics by those demographics will amplify the Hub's and Library's understanding of access and reach. That data should then be used to compare to the current and historical South Bend demographic context, with a lens to understand who needs the platform the most, and is accessing it the least, and then developing and adapting specific outreach and marketing strategies to engage those communities.

5. **Continue to apply a targeted universalism approach more consistently and intentionally in order to reach and engage residents who face disproportionate barriers.** There is agreement that, as part of its mission, Bendable can and should help the most marginalized and underserved communities in South Bend become lifelong learners as a mechanism to building community and economic resiliency. There are differing opinions on how the focus on this target population translates into guiding decision-making and who the Hub and Library teams prioritize for engagement. For some Hub and Library team members, Bendable should be designed for everyone in South Bend and should not disproportionately focus efforts (e.g., design, outreach) on marginalized groups – i.e., a *universal* approach. For others, Bendable should apply a *targeted* approach, focusing only or primarily on groups experiencing marginalization. As one Hub team member explained, "The bullseye is… people for whom there is no mechanism they are going to connect to that will get them to Bendable, so you have to go find them." Bendable's engagement approach has not been and does not have to be an "either/or". Bendable can be for everyone in South Bend while also being targeted in its design, marketing, outreach, and engagement by applying the concept of *targeted universalism,*[21] whereby programs, policies, and approaches are designed keeping in mind the target population, but making them available to, or adapted for all groups. The full population of South Bend can access, reach, and benefit from Bendable even though the team applies a strategy that is customized to solve for the access and reach barriers faced by the most underserved and marginalized communities in South Bend. The principle of targeted universalism has been an undercurrent to the team's philosophy since Bendable's conception, but there is an opportunity for the Hub and Library teams to more consistently and intentionally apply this approach in their activities going forward in South Bend, including clarity in communication and messaging with stakeholders, as well as expansion to other cities.

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[21] For more on targeted universalism, see this resource from john a. powell as well as Angela Glover Blackwell's "The Curb-Cut Effect."

Figure G. Explanation of universal, targeted, and targeted universal approaches[22]

Universal approaches	Targeted Universal approaches	Targeted approaches
Providing the same support **to all population groups,** regardless of their context, needs or circumstances.	Setting **universal goals that can be achieved by targeting** the most disadvantaged people. For example, innovations unlocked for people of color (POC) can be adapted for and applied to other groups to achieve universal goals.	Providing **support only to the most** disadvantaged population groups, aiming to reduce differences alone.
Blanket <u>universal</u> approaches can deepen inequities	*<u>Targeted universalism</u> aspires to achieve universal goals based on targeted needs*	*Purely <u>targeted</u> approaches don't aim for universal goals*

The Hub formerly identified the target population ("bullseye") for Bendable as people making less than $18 an hour and vulnerable populations. There is a lack of specificity within those populations, particularly in terms of race. In the context of South Bend's history of systemic racism and as evidenced by data from interviews, surveys, and user experience analytics, in order for Bendable to reach communities facing disproportionate barriers to accessing the platform – namely, communities of color and low-income communities – outreach will need to be targeted.

> *"The bullseye is…**people for whom there is no mechanism** they are going to connect to that will get them to Bendable, so **you have to go find them**."*
>
> - Hub team member

As noted, in many ways, Bendable is already applying a targeted universalism approach; in others, Bendable is taking more of a universal approach. We believe, however, that there is an opportunity to advance the impact Bendable aims to achieve for the "bullseye" by taking a more consistent and intentional targeted universalism approach. For example, several stakeholders explained that the communities they serve – particularly communities of color, low-income communities, and people who were formerly incarcerated – experience a lack of access to basic needs including food, housing, health services, stable jobs, and transportation – on top of a lack of access to digital technology. The Hub and Library teams are actively applying the principle of targeted universalism in their marketing and outreach efforts to these populations. By working with partner organizations meeting those basic needs (e.g., Goodwill), the Hub and Library are designing their outreach in a way that keeps in mind those access barriers, while also learning from those efforts to understand how Bendable can effectively support greater access and engagement for the entire South Bend

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[22] Sources: Targeted Universalism, Berkeley Haas Institute.

community. When the Hub and Library revisit the idea of *Bendable Buddies*, the teams can design the feature specifically based on an understanding of what would foster mutual accountability for learning among target ("bullseye") users, and subsequently make the *Bendable Buddies* feature available to all users.

6. **Stay actively accountable to the principles and considerations in the equity guide.**[23] In order to center equity in the Hub's activities moving forward, the Hub as a team, and individually, must continue to build their awareness and invest in their learning, including through trainings and self-reflective processes. Setting individual and team goals related to considerations outlined in the equity guide can help the Hub stay accountable to themselves and the community. The Hub can continue to reflect on their practice by revisiting the document in ongoing, recurring meetings that include Library staff, organization partners, and community members.

7. **Stay in close dialogue on and continue to evolve the transition plan for the Hub and the Library.** The Library will continue to take increasing responsibility and ownership for implementing Bendable in South Bend. The Hub and Library have co-developed a transition document that outlines the expectations and timeline for the transition. In order to ensure a smooth and successful handoff, the Hub and Library should continue to stay in close conversation on the transition in order to evolve the current transition plan. Doing so will help build on the expectations and specific roles and responsibilities in the document, which could surface needs for investment of resources from the Hub or Library, as well as a timeline and strategy to share and communicate essential parts of the plan with stakeholders (e.g., transition of any relationships).

8. **Continue to embed evaluation and learning practices in the Hub's activities.** Whether or not the Hub engages with an external partner, as time goes on, it will be important to continue capturing key learnings related to Bendable's design and implementation against the theory of change. The Hub can develop and continually revise a set of strategic learning questions to guide its ongoing learning from data and experiences, and reflect on their learnings as a team and with the Library.

Principles of Practice for Scaling Lifelong Learning Systems

The principles are based on the findings from the developmental evaluation and aim to codify the essential ingredients for success in implementing and scaling a lifelong learning system – like Bendable – to other geographies. While they may be implemented in different ways in each geography, they can guide the design, implementation, and evaluation of life-long learning initiatives across locales.

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[23] See Appendix G: Equity Principles & Practices for Scaling Bendable for the complete equity guide.

Table 6. Principles of practice for scaling lifelong learning systems

Principle	Definition
1. **Actively engage residents to ensure the lifelong learning system reflects the needs, interests, and makeup of the community.**	Build in features that reflect and enhance aspects that make the system feel "by and for" the community (e.g., *Community Collections, Community Shelves, Live and Learns*). Seek and incorporate input from the community into decision-making by bringing community members and local organizations into the decision-making process. Create explicit opportunities to give agency to the local community to inform and influence processes, guide decision-making, and, ultimately, to own implementation of the lifelong learning system.
2. **Understand the historical, social, political, and economic context of each geography.**	Invest substantial and recurring time in understanding the local community—including its history and demographics. Confirm findings with local community members. Continue to scan and monitor the evolving local context, including changing economic, social, and political issues and demographics within the geography.
3. **Allow substantial lead-time for building trusting relationships with city and community organizations, and residents.**	Invest significant resources—staff and time—to build strong relationships with community members and diverse organizations. Cultivate those relationships over time and create room for flexibility to develop those relationships on a schedule that does not feel forced or burdensome to community members or organizations.
4. **Tailor outreach, engagement, and marketing strategies.**	Continuously ask the question of who the lifelong learning system is reaching (or not) and how. Collect and analyze demographic data (ZIP, race, gender, age, educational attainment) to the degree possible in order to understand who the platform is reaching and how. Adapt outreach, engagement, and marketing strategies, including developing customized value propositions, based on the needs and barriers faced by each group.
5. **Commit to continuously thinking about inclusion.**	When entering a new geography, make a concerted effort to engage a diverse set of stakeholders, including communities of color and immigrant populations. Throughout the implementation process, continuously seek and incorporate guidance from the community as an anchor point to guide ongoing decision-making. Push the team to think constantly and consistently about how to make the platform more inclusive and how structural inequities may be affecting or preventing community members from accessing and engaging with the platform.

6. Learn and fail fast, but also build in time to pause and reflect.	Incorporate design thinking principles of learning and failing fast, as well as being adaptable, flexible, and pivoting quickly as part of the process from conception. Build in more time for input – whether from the Library (or equivalent local anchor partner) or community – as well as more time to engage in reflection and dialogue on data and experiences – e.g., team learning conversations – and be willing to adjust timelines based on input and feedback.
7. Maintain a team culture of strong trust and mutual respect, grounded in a shared vision.	The strength of a well-functioning team rests on the trust and respect that every member has for each other. Establish a similar level of trust and respect between team members, enhanced by alignment in a shared vision and goals that helps guide the team's decision-making and actions. The need for this alignment is amplified in a virtual environment and as the Hub scales and coordinates across multiple geographies.
8. Engage with authenticity and humility with the community.	Leaders of the lifelong learning initiative must have an orientation of humility, gratitude, and patience to be able to engage authentically and effectively with the community. Listen to the community and do not come in with a fixed solution to implement immediately. Be open to adapting the system as well as ways of working in order to better serve and amplify the intended impact for the local community.
9. Support ongoing evaluation and learning to capture and share learnings within the team, with key stakeholders, and with funders.	Facilitate regular opportunities for the team to engage in reflection and learning from data and experiences internally, with key stakeholders, and with the community. Document lessons learned and effective practices. These learnings can support and enhance ongoing implementation of the lifelong learning system within each community.[24]

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[24] The Drucker Institute is considering establishing a network of lifelong learning cities (community of practice) to support and facilitate shared learning across geographies.
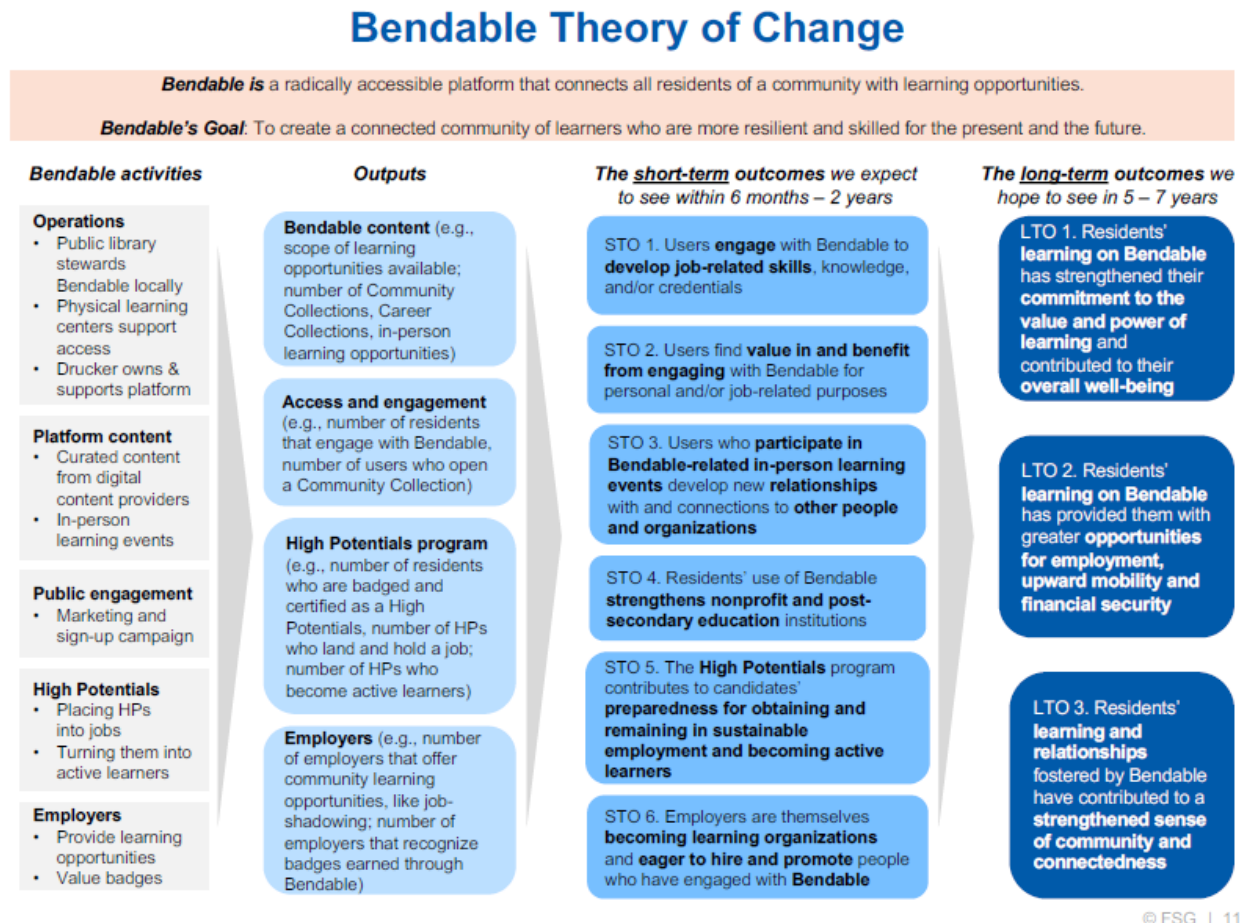
Conclusion

Findings from the Bendable developmental evaluation show that the launch of the lifelong learning platform has been successful in reaching and engaging people in South Bend. The Hub and Library are being intentional about aligning the resources provided on the platform with the interests and needs of the people of South Bend. The team has implemented a robust marketing and outreach plan focused on mass marketing, engaging institutions, as well as direct, on-the-ground tactics to increase Bendable uptake, and is using ongoing learning and metrics to adapt strategies to more tailored approaches focused on specific communities and organizations. The Hub and Library continue to leverage partnerships with a diverse set of community-based organizations to engage communities that may be otherwise difficult to reach due to barriers to access. In addition, the Hub has demonstrated a willingness to develop and use an equity tool developed in partnership with FSG to more explicitly embed equity in all aspects of its work and as the Hub explores scaling the platform to other geographies.

Bendable's launch and progress thus far is impressive. Given the early stage of the initiative's implementation, it is important to continue to prioritize these practices and ongoing learning, reflection, and adaption as part of the platform's ongoing implementation in South Bend, and to prioritize centering the community and equity as the Hub explores scaling the lifelong learning system to other geographies.

Appendices

Appendix A: Bendable Theory of Change – July 2019[25]

The Bendable Theory of Change was updated during the developmental evaluation (see Appendix B).

Bendable Theory of Change

Bendable is a radically accessible platform that connects all residents of a community with learning opportunities.

Bendable's Goal: To create a connected community of learners who are more resilient and skilled for the present and the future.

Bendable activities

Operations
- Public library stewards Bendable locally
- Physical learning centers support access
- Drucker owns & supports platform

Platform content
- Curated content from digital content providers
- In-person learning events

Public engagement
- Marketing and sign-up campaign

High Potentials
- Placing HPs into jobs
- Turning them into active learners

Employers
- Provide learning opportunities
- Value badges

Outputs

Bendable content (e.g., scope of learning opportunities available; number of Community Collections, Career Collections, in-person learning opportunities)

Access and engagement (e.g., number of residents that engage with Bendable, number of users who open a Community Collection)

High Potentials program (e.g., number of residents who are badged and certified as a High Potentials, number of HPs who land and hold a job; number of HPs who become active learners)

Employers (e.g., number of employers that offer community learning opportunities, like job-shadowing; number of employers that recognize badges earned through Bendable)

The _short-term_ outcomes we expect to see within 6 months – 2 years

STO 1. Users **engage** with Bendable to **develop job-related skills**, knowledge, and/or credentials

STO 2. Users find **value in and benefit from engaging** with Bendable for personal and/or job-related purposes

STO 3. Users who **participate in Bendable-related in-person learning events** develop new **relationships** with and connections to **other people and organizations**

STO 4. Residents' use of Bendable **strengthens nonprofit and post-secondary education** institutions

STO 5. The **High Potentials** program contributes to candidates' **preparedness for obtaining and remaining in sustainable employment and becoming active learners**

STO 6. Employers are themselves **becoming learning organizations** and **eager to hire and promote** people who have engaged with **Bendable**

The _long-term_ outcomes we hope to see in 5 – 7 years

LTO 1. Residents' **learning on Bendable** has strengthened their **commitment to the value and power of learning** and contributed to their **overall well-being**

LTO 2. Residents' **learning on Bendable** has provided them with greater **opportunities for employment, upward mobility and financial security**

LTO 3. Residents' **learning and relationships** fostered by Bendable have contributed to a **strengthened sense of community and connectedness**

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[25] Source: Bendable Assessment and Learning Framework – July 2019.

Assumptions:

Bendable's design assumes stakeholder interest, willingness, and capacity to engage with Bendable (1 of 2)

Residents' access to Bendable

1. The marketing campaign for Bendable will effectively communicate what Bendable is, how to access it, and why people should engage with it – inspiring residents to use the system and tell others about it.

2. Bendable's design will be "radically accessible" so that everyone in South Bend – especially the most vulnerable residents – will want to and be able to use it.

Residents' engagement with Bendable

3. The content available on Bendable will offer something of value to all users and all users will be able to see themselves represented in Collection creators and content.

4. Residents will be open to and interested in learning on their own; motivated to earn badges and credentials; and will continue using Bendable's online platform for personal and job-related purposes throughout their lives.

5. Users will be willing and able to form new relationships and communities as a result of engaging with Bendable, and will share their interest in and learning on Bendable with others.

High Potentials program

6. High Potentials will find jobs, remain employed, and achieve the necessary stability to meet their own basic needs – which will build their capacity to become active learners on Bendable.

A comprehensive set of assumptions is included in the Appendix.

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Bendable's design assumes stakeholder interest, willingness, and capacity to engage with Bendable (2 of 2)

Employer engagement with Bendable

7. Employers will see the value of Bendable (especially badging), and will want to invest the time and resources in curating Collections and Pathways; accepting badges as credible signals of potential employees' skills; offering badges of their own; and supporting employees to use Bendable on company time.

Bendable infrastructure and operational capacity

8. SJCPL staff will have sufficient time, skills, knowledge, resources, and other capacities to effectively steward the Bendable system; continuously maintain and grow Bendable's content to stay relevant and accurate for any Bendable user, at any time; support Bendable users; and collect monitoring data about Bendable's progress and impact.

9. The "Hub" organization will have sufficient capacity and resources to support Bendable operations (e.g., training Library staff, developing toolkits, managing technology upgrades), work with employers as part of the High Potentials program, and replicate Bendable in new cities at the same time.

Bendable's impact on all of South Bend

10. Individual residents' development of enhanced resilience and skills for the present and future will create a connected community of learners, which is supported by a more connected ecosystem of learning supports and resources (including vocational and higher education providers) in South Bend.

A comprehensive set of assumptions is included in the Appendix.

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Updated Bendable Theory of Change

Bendable is a radically accessible platform that connects all residents of South Bend with learning opportunities.

Bendable's Goal: Bendable aims to cultivate in the residents of a community—no matter their age, income or educational background—the habit of learning so that they become more resilient in the face of a fast-changing economy..

Bendable cultivates in people the habit of learning by:

Curating high-quality, highly relevant **national learning resources**, while also organizing and elevating **local learning opportunities**

Recognizing that people turn to learning for all sorts of **reasons**—developing skills for work, improving their everyday lives, satisfying their curiosity or just having fun

Involving **stakeholders** from across the entire community—businesses, government agencies, nonprofits, educational institutions, neighborhood associations and individuals from all walks of life—in the design and implementation of the system

Making learning radically **accessible and equitable** by leveraging the reach of the public library and by **collaborating with** all of our stakeholder **partners** to integrate Bendable into their programming and activities

The short-term outcomes we expect to see within 6 months – 2 years

STO 1. Users **engage** with Bendable to **develop job-related skills**, knowledge, and / or credentials

STO 2. Users find **value in and benefit from engaging** with Bendable for personal and / or job-related purposes

STO 3. Users who **participate in one or more Bendable-related learning events** develop new **relationships** with and connections to **other people and organizations**

STO 4. Residents' use of Bendable **strengthens nonprofit and post-secondary education** institutions

STO 5. Local employers are **eager to hire or promote** people who have engaged with **Bendable**

The long-term outcomes we hope to see in 5 – 7 years

LTO 1. Using Bendable has strengthened residents' **commitment to the value and power of learning** and contributed to their **overall wellbeing**

LTO 2. Using Bendable has provided residents with greater **opportunities for stable employment, financial security, and upward mobility**

LTO 3. Bendable has contributed to a **strengthened sense of community and connectedness** among residents

Appendix C: Data Collection Methodology

Method	Total sources of input
PHASE 1: Pre-launch and beta test (December 2019 to May 2020)	
Beta user experience forms	58
Check-ins with the Hub	7
Hub team and Library core team interviews	5
Participant observation (beta test on-boarding sessions, stakeholder meetings, partner meetings)	11
Secondary research (South Bend history, ZIP analysis, and digital access)	36
Stakeholder feedback forms	22
Stakeholder interviews	11
PHASE 2: Post-launch (June to November 2020)	
Check-ins and meetings with the Hub (including with the Library core team)	77
Feedback survey – Venues Parks and Arts Youth Jobs program participants (one survey)	62
Hub team and Library core team interviews	5
Participant observation (stakeholder, partner, and Kilter meetings)	16
Stakeholder interviews	13
User survey – Library patrons (one survey)	506
Weekly and monthly dashboards	24

Appendix D: Marketing and Outreach Summary

Channel	Marketing / Outreach Activity (as of November 30, 2020)
City coalition (Venues Parks and Arts; School Corporation; food bank; elderly services; Cultivate Culinary)	20,000 flyers distributed via food boxes
City of South Bend	40,000 flyers distributed via City water bills; messaging on City website
Community-based organizations, local employers	Messaging disseminated via email, flyers, mail, social media posts, trainings, and website communications: • Beacon Health Systems • Blacktavists • Bridges Out of Poverty • General Stamping and Metalworks • Goodwill • IUSB • Ivy Tech • Kingdom Christian Center Church • Lippert Components • Mt. Carmel Missionary Baptist • Ridge Auto Parts • Senior One Care • Sinai Synagogue • South Bend Church of God • South Bend Public School Corporation • South Bend Regional Chamber of Commerce • South Bend-Elkhart Regional Partnership • TSG Diversity • United Way • Walmart • WorkOne
Content providers	Messaging disseminated via: • Cell-Ed • Common Threads • GCF Global • LRNG • Penn Foster • Study.com

Flyers	Disseminated 3,600 flyers in-person via: • Boys and Girls Club • Community Rally (Common Council) • Ducomb Center • Dunbar Apartments • Excel Center • Goodwill • Heritage Southeast • High Potentials (Individuals) • Historic Rushton Senior Apartments • Ivy Tech • Life Treatment Center • Lindon Grill • Miami Hills • Monroe School • South Bend Chocolate Cafe • United Way • YWCA
Funders	Social media posts disseminated via: • Google.org • Walmart.org
National media	Articles and PR releases published via: • Drucker Institute • Fortune • South Bend Tribune • Whiteboard Advisors • WNDU • WSBT
Radio	Ads on WUBS, WSBL, and WNUR
SJCPL	In-person flyers; 30,000 emails
Social media platforms	Digital ads
South Bend Tribune	Ad inserts
Television ads	Cable broadcasts

Appendix E: Bendable Weekly Dashboard – November 27 to December 3, 2020

Week of 11/27 – 12/3

Visitors

Visitors to-date		Weekly change
Total visitors	21,178	+379 (2%)
Greater South Bend visitors*	10,930	+211 (2%)
Non-Greater South Bend visitors	10,248	+168 (2%)
Total returning visitors	3,355	+63 (2%)
Greater South Bend returning visitors	1,768	+36 (2%)
Non-Greater South Bend returning visitors	1,587	+27 (2%)

Weekly Visitors

Accounts

Type		Weekly change
Total accounts	1,067	+11 (1%)
Verified users	644	+6 (1%)
Temporary Users	43	+5 (13%)
Expired Users	314	+0 (0%)
Demo Accounts	64	+0 (0%)

Resource Engagement

Total resources started to-date (% change)	Resources started this week
2,690 (+5%)	128

Top Hit Content

Top Resources started this week		Provider
1. The Psychology of Criminal Justice	7	edX
2. Creating a Culture of Inclusion in the Workplace	6	Study.com
3. Freelance Work	5	GCF Global
4. Communication Skills for Customer Service	5	Study.com
5. WorkReady: Time Management	4	Cell-Ed

Top Collections opened		Unique learners
1. Getting back on your feet after hard times (Community)	31	27
2. Where to find artistic inspiration (Community)	21	19
3. Making learning fun for kids at home (Community)	18	17
4. Working through stress with dance and movement (Community)	19	13
5. Discovering a love of Mexican cooking (Community)	10	8
6. How to invest your first $1,000 (Community)	8	7
7. How to get started with coding (Community)	8	7
8. Become a pharmacy technician (Career)	9	6
9. Become a software developer (Career)	8	6
10. How to start making films on a budget (Community)	7	6

Note: Data sourced from Bendable Analytics Dashboard. *Includes South Bend; St. Joseph County; and Elkhart, Marshall, Kosciusko, and Fulton Counties.

Appendix F: Bendable Monthly Dashboard – November 2020

MONTHLY DATA REPORT - NOVEMBER 2020						
ACTIVATING LEARNING						
Visitors to Bendable	*June 5 - Nov 30*					
	User Count	**Increase from previous month**	**% change from last month**			
Total Unique Visitors	21047	2537	12.05%			
Unique South Bend Visitors	10881	1392	12.79%			
Unique Non SB Visitors	10166	1145	11.26%			
Total Returning Visitors	3326	354	10.64%			
South Bend Returning Visitors	1751	205	11.71%			
Non SB Returning Visitors	1575	149	9.46%			
Accounts Created To Date	Up to Nov 30, 2020					
	User Count	**Increase from previous month**	**% change from last month**			
Total Accounts	1059	99	9.35%			
Verified Users	640	57	8.91%			
Temporary Users	41	24	58.54%			
Expired Users	314	18	5.73%			
Demo Accounts	64	0	0.00%			
Resource Engagement	*Nov 1 - Nov 30*					

Resources started this month (continued to site):	*603*						
Total resources started to date:	*n/a*						
% change from last month	*16.86%*						

Accounts Created on Premium Partner Sites	*Nov 1 - Nov 30*						
Partner	**Accounts Created this month**	**Total Accounts created to date**					
Cell-Ed	10	86					
edX	0	1					
Penn Foster	5	34					
Sokanu	6	117					
Study.com	18	115					

Collection Engagement	*Nov 1 - Nov 30*						
Career Collections:							
Title	**# of Times Collection Opened**	**# of Unique Learners Who Have Opened Collection**	**Former position**				
1 **Become a medical coder**	522	405	3				
2 **Become job ready**	289	228	5				
3 **Become a technical support specialist**	271	206	2				
4 **Become a CNC operator**	265	194	4				

5	**Become a patient care associate**	216	182	7			
6	**Become a software developer**	212	174	1			
7	**Become a pharmacy technician**	195	143	6			
8	**Become a materials handler**	79	71	8			
	DRIVING A DEPTH OF LEARNING						
	Learner engagement with Premium online Partners	*Nov 1 - Nov 30*					
	Partner	**Courses Started* this month**	**Total Courses started***	**% change from last month**	**Courses completed this month**	**Total Courses Completed**	**% change from last month**
	Cell-Ed	23	193	13.53%	12	95	14.46%
	edX	46	182	33.82%	0	0	#DIV/0!
	Penn Foster	19	57	50.00%	1	3	50.00%
	Sokanu	10	165	6.45%	4	111	3.74%
	Study.com	75	380	24.59%	2	9	28.57%
	Learner engagement with 'friction free' online Partners	*Nov 1 - Nov 30*					
	Partner	**Referrals from Bendable.com**	**Page / Lesson views (avg for all users)**	**Avg Duration (avg for all users)**			
	GCF Global	37	4.28 / 2.72	5:01 (4:02)			
	LRNG	37	5.40 / 1.43	7:44 (0:46)			

Common Threads	13	11.02 / 228%	23:17 (904%)				
Sokanu	[427]	[4.38] / 3.92	[7:31] (65.47%)	*data is from June 5 thru Nov 30			
Cell-Ed				*request for data out			
Penn Foster	19	1.39/1.27	1:56 (88.36%)				
Study.com				*does not use GA			
Drucker Institute							
edX							
Code School Portal				*does not use GA			
IUSB ed2go							
Khan Academy							
Career Collection Learner Progress	*Nov 1 - Nov 30*						
	Learner count this month	**Learner count to date**	**% change from last month**				
Number of learners who have started Career Collections	*13*	*188*	*7.43%*				
Number of learners who have completed at least one badgeable course	*4*	*64*	*6.67%*				
Number of learners who have completed at least one Career Collection badge	*0*	*0*	*#DIV/0!*				

Career Collection Engagement	Nov 1 - Nov 30					
	Career Collection Engagement this month	Total Career Collection Engagement to date	% change from last month			
Number of Career Collections started	36	369	9.76%			
Number of badgeable courses completed	7	71	9.86%			
Number of Career Collection badges earned	0	0	#DIV/0!			
Community Shelves	Nov 1 - Nov 30					
	This month	Total number to date				
Active Community shelves	2	12				
Unique learners who have 'joined' a Community program	0	0				
Resources started via Community shelves	5	5				
Learning Support Engagement	Nov 1 - Nov 30					
TK						
CULTIVATING A HABIT OF LEARNING						

Returning Visitors This Month	Nov 1 - Nov 30					
	This month	**Last month**	**% change from last month**			
Number of SB returning visitors	1751	205	11.71%			
Learner Engagement	*Nov 1 - Nov 30*					
Number of unique users who have	**Learner Count**	**% change from last month**				
left Bendable to access learning from a partner	319	38.10%				
left Bendable to access learning for work	71	10.94%				
left Bendable to access learning for life outside of work	300	42.86%				
left Bendable to access learning for work and for life outside of work	26	0.00%				
Re-engagement	*Nov 1 - Nov 30*					
	Learner Count this month	**Total Number of Learners to date**				
Number of users who signed up to receive emails or text messages from Bendable	12	577				
Number of those who are participants	0	0				

in a Community program						
INCLUSION ACROSS THE COMMUNITY						
Accounts created by Zip code	*Beta - Nov 30*					
Description of area	**Zip Code**	**Learner Count**	**Increase from last month**			
Total Bendable Accounts	**All**	1061	102			
Library card holders w/ no zip data	**No Zip**	106	35			
Bremen; rural; outside of service area	**46506**	1	0			
Elkhart	**46514**	1	1			
South Elkhart; outside of service area	**46517**	1	0			
Granger; upper middle class; outside service area	**46530**	59	6			
Lakeville; rural; low pop density; predominantly white; low income (Lakeville Branch)	**46536**	3	1			
Mishawaka; predominantly white; low income; outside service area	**46544**	29	5			
Mishawaka; predominantly white; mixed	**46545**	32	9			

income; outside service area					
Mishawaka; predominantly white; mixed income; outside service area	**46546**	1	0		
New Carlisle; rural; predominantly white; outside of service area	**46552**	1	0		
North Liberty; predominantly white; rural (North Liberty Branch)	**46554**	10	1		
Notre Dame; predominantly white	**46556**	5	0		
Osceola; predominantly white; outside of service area	**46561**	7	1		
Plymouth; predominantly white; rural; out of service area	**46563**	2	0		
Walkerton; predominantly white; rural; out of service area	**46574**	6	1		
Downtown South Bend; diverse; low income; dense population (Main Library)	**46601**	92	7		
Southeast South Bend; diverse; primarily African American; low income; dense	**46613**	51	1		

population (Tutt branch)						
South South Bend + rural; older population; predominantly white; low density; comfy empty nesters; middle class (Centre Township Branch)	**46614**	119	8			
River Park Neighborhood; high density; upper-middle class; mixed income; (River Park Branch)	**46615**	69	2			
Near Northwest Neighborhood; diverse; predominantly African American; low income; urban (Keller Park Branch)	**46616**	40	4			
Northeast Neighborhood; diverse; predominantly African American; mixed income	**46617**	84	4			
West Side; diverse; predominantly Latinx; low income (Western Branch)	**46619**	84	10			
Northwest South Bend(Airport); large African American pop.; diverse; low income (LaSalle & German Branch)	**46628**	109	4			

Northeast South Bend; middle class; predominantly white; suburban periphery (Francis Branch)	**46635**	22	2		
Roseland; middle class; predominantly white; suburban periphery (Francis Branch)	**46637**	55	1		
PO Box, Retired Clergy, Misc.	**46680**	1	0		
Demo users outside of South Bend	**99999**	71	0		

Appendix G: Equity Principles & Practices for Scaling Bendable (Bendable Equity Guide)

Context

The Hub (also known as the Drucker Institute) has developed a lifelong learning system with the aim of supporting the resiliency of individuals, economies, and communities. The first version of the lifelong learning system launched in South Bend, Indiana in June 2020 – under the name "Bendable" – is stewarded by the St. Joseph County Public Library (SJCPL or the Library) and supported by the Hub. The underlying philosophy of the initiative is that **providing equal access to learning opportunities** for personal and job-related growth will **enhance the resiliency** of all who use it and **will lead to equitable**[26] **outcomes**. By building users' individual resiliency, relationships with one another, and involving employers, the lifelong learning system will contribute to economic and community resiliency in each geography in which the system is launched.

Purpose of this Document

Given Bendable's mission and the focus on South Bend's "most under-served and economically vulnerable,"[27] the concept of equity is an important value of the lifelong learning system. To ensure that the goal and outcomes of the lifelong learning platform will be achieved, equity should be a consistent value and goal for all contexts where the system is replicated. This document serves as a resource to assist the Hub team in answering a <u>central learning question</u>: **In what ways might the lifelong learning platform live into our goal of scaling such that it produces the most equitable outcomes for the communities of focus?**

To do that, we consider the ways in which equity can be embedded throughout the process of developing, launching, and implementing a lifelong learning system across multiple geographies. These guidelines were developed based on reflections over the course of 18 months through learnings from stakeholder interviews and users, participant observation in stakeholder meetings, consultations with the Hub, data analysis on reach and engagement, and input from FSG team members[28]. The following principles and practices follow several steps the Hub and Library Bendable teams have taken or are currently implementing to center equity.

These principles and practices are not intended to be exhaustive nor is this document a simple checklist. **They are aspirations based on the current state, and should be continually revisited and revised.** As you strive towards these aspirations, they will help unlock more context-specific practices. This list should evolve over time and to each context in which the lifelong learning system is designed and launched. Though these principles and practices were developed with the intention of guiding expansion

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[26] Angela Glover Blackwell, CEO of PolicyLink and respected thought leader in the field, defines equity as "*Just and fair inclusion into a society in which all can participate, prosper, and reach their full potential. Unlocking the promise of the nation by unleashing the promise in us all."* Source: https://www.policylink.org/equity-in-action/equity-is

[27] Drucker Institute, "South Bend Lifelong Learning System: Forging resilience through Learning," Spring 2019.

[28] In addition to current FSG team members (Hallie Preskill, Nikhil Bumb, and Tori Fukumitsu), thank you to FSG staff Andria Seneviratne, Colleen McCann, and Veronica Borgonovi for their input and review in developing this document.

of the lifelong learning platform to other cities, in some instances, the Hub may consider strengthening their focus on equity by applying these principles going forward in South Bend. The Hub may consider sharing this document with partners as a way to discuss values and expectations, as well as the basis of an accountability measure. Finally, we recommend that these guidelines be embedded in future evaluation work.

Suggested Approach for Using this Document

The process below highlights *one* approach to incorporating a regular practice to reflect on these guidelines, although there are multiple ways to support the integration of these guidelines when designing and implementing a lifelong learning system.

1. Share this guide with all Hub staff and core team members. Ask members to individually reflect on their experiences and the associated principles and practices based on the process components relevant to their roles.
2. Hold a full team session to share individual reflections and jointly discuss the degree to which these principles and practices are reflected in current or prior activities and processes, as well as to brainstorm on how to integrate these guidelines going forward.
3. Make individual and team commitments to specific practices to advance equity, and collectively determine how to hold one another accountable to these goals in a supportive but unyielding fashion.
4. Establish a regular cadence (e.g., monthly) dedicated to revisiting this document, sharing updates on commitments made, discussing challenges and roadblocks, and updating commitments. During these meetings, create time to also share on the ease or degree to which these practices are becoming regular or second nature.
5. Where relevant, add new practices to this document and continuously evolve it to new contexts.

By implementing a similar process to regularly incorporate these guidelines and reflect on these processes, the aim is to ultimately build and refine a capability to consistently and constantly embed and center equity in all functions, team members, and implementation.

Principles for Embedding Equity

At its core, a lifelong learning system like Bendable is about building a customized platform for each geography that provides equal access to learning opportunities for personal and job-related growth in order to lead to equitable outcomes and enhance the resiliency of all who use it. Living into this philosophy requires a critical focus on embedding equity throughout all processes of the lifelong learning system based on four key principles:

1. **Center the voice of the community.** When entering a new geography, make a concerted effort to engage a diverse set of stakeholders, including communities of color and immigrant populations. Continuously seek and incorporate guidance from the community as an anchor point to guide ongoing decision-making.

2. **Identify and challenge assumptions.** Assumptions are an inevitable part of quick decision-making, but are based on an underlying set of beliefs that can and often are grounded in biases. Take explicit measures to surface and reduce biases, challenge assumptions, and invite a diversity of input to do so.

3. **Build in time and opportunities to continuously reflect.** Engage in dialogue about what is being learned on an ongoing basis, and refine processes based on learnings.

4. **Support community ownership.** In addition to seeking and incorporating input from the community into decision-making, bring community members and local organizations into the decision-making process. Create explicit opportunities to give agency to the local community to drive processes and, ultimately, to own implementation of the lifelong learning system.

These four principles serve as the foundation for the following equity-based practices that support an approach focused on equity at each step of the process to build and implement a lifelong learning system like Bendable.

Practices for Embedding Equity

In this section, we organize the practices for embedding equity by components of the process to build and implement a lifelong learning system in a specific community. These components are not necessarily sequential; some are parallel or crosscutting. For each component, we start with one or more learning questions to prompt considerations for how to center equity in that part of the process and then provide practices that begin to address each learning question.

Embedding Equity in Scaling Bendable

1. Center the voice of the community.
2. Identify and challenge assumptions.
3. Build in time and opportunities to continuously reflect.
4. Support community ownership.

Establishing Ongoing Feedback Loops
Selecting Geographies for Expansion
Conducting Research & Collecting Data
Developing Partnerships & Community Relationships
Building the Hub & Core Team
Designing & Developing the App
Marketing & Outreach
Designing & Implementing Evaluation & Ongoing Learning

Process Component	Practices for Embedding Equity[29]
Selecting Geographies for Expansion	**LQ1. What defines "need" for a geography to have a lifelong learning system?** 1. Establish criteria for city consideration and determining city need for a lifelong learning system (e.g., population size, percent of population earning below $18 an hour, strong presence of community anchor or other community organizations, strong social service network). **LQ2. What could it look like to have a more inclusive process? How can it be designed to ensure as equitable access as possible for geographies with the greatest need?** 2. Consider processes that allow for greater diversity of geographies applying for consideration. For example, a well- and widely advertised open RFP (request for proposal) process can reduce network bias. Alternatively, requesting geographies to submit a LOI (letter of interest) and doing an initial stage of evaluation before requesting additional documentation reduces the burden of an onerous "one-shot" application process. 3. Limit bias in who finds out about the platform by evaluating how information about the lifelong learning system and the potential for expansion is reaching geographies, as well as which geographies (and who) is able to access the information. 4. Research and proactively reach out to cities with high need for a lifelong learning system that may not be in immediate networks, may not be good candidates, or may be encountering other barriers to entry/application. **LQ3. Once geographies are under consideration, how can the selection process be designed to be as inclusive as possible? Are we being transparent enough about our process and decision-making?** 5. Consider who you are asking to be involved in the process and the burden of materials you are asking them to produce to be a candidate for consideration.[30] 6. Conduct research into the demographic makeup, as well as the historical context, of geographies under consideration and/or geographies that express interest to identify and assess needs and target populations.

[29] Racial Equity Tools provides a wide array of resources (tools, research, tips, curricula, and ideas) that can supplement and help implement these practices, starting with increasing individual and team understanding of racial equity as well as how to better incorporate racial equity at every level and step of the process (e.g., training and development, evaluation and learning).

[30] While not directly applicable in a 1:1 manner, Arabella Advisors' "Incorporating Diversity, Equity, And Inclusion In Your Grant-Making Process: A Checklist Of Potential Actions" provides a helpful list of actions and practices to improve diversity, equity, and inclusion in applications practices, many of which can be translated to and/or slightly modified to apply the geography selection and RFP process.

	7. Seek input from and ensure the inclusion of members of target communities in the process before making decisions about geography selection (e.g., inclusion of community members in a committee).
	8. Clearly communicate information about the timeline, steps, and requirements (including any limitations and/or flexibility) of the application and selection process, as well as how and why decisions have been made.
	9. Cultivate trusted relationships with those involved in the process from geographies under consideration to enable two-way sharing of candid feedback and information.
Conducting Research & Collecting Data	**LQ1. How can the geography's history and demographics inform the life-long learning system's design and implementation?**
	1. Invest significant time in understanding the local community—including history and demographics—through interviews, secondary research, and observation. Confirm findings with local community members.
	2. Continue to scan and monitor the evolving local context, including changing issues and demographics within the geography.
	LQ2. Are research and data collection processes inclusive?
	3. Where possible, partner with local research organizations or organizations specialized in community-based research to build trust.
	4. Enlist translators to facilitate data collection from and involvement of non-English speakers, or ask them to conduct interviews / focus groups in participants' primary language and have it translated afterwards.
	5. Compensate interviewees for their time (e.g., grocery or gas gift cards). Not all interviewees may accept compensation but, for fairness, all interviewees should be offered an honorarium. Some interviewees, especially expert interviews, may decline honoraria (by policy or principle) or may ask to donate the fee. Where possible, gift cards to a local store demonstrate an investment in the local community.
	6. Ask permission to interview, take photos, record, and to use information shared. These steps communicate respect, and help build rapport and trust.
	7. Be transparent on how the information provided will be used, as well as what follow-up, if any, will look like. Promise confidentiality / anonymity if needed.
	LQ3. How can this initial research and data collection guide other efforts?
	8. Anchor the design of other research and engagement efforts in these data (e.g., when considering representation among partners, who to interview within the community). For example: • Ensure representation that reflects the local demographic makeup in community interviews, particularly emphasizing representation among target populations.
	9. Disaggregate data and compare with local demographic data to analyze by different identity groups or geographies (e.g., ZIPs of interest).

Developing Partnerships & Community Relationships	**LQ1. What steps should be taken to design equitable partnerships?**
	1. Define what it means to be a partner and set clear expectations (for all involved).
	2. Distinguish between roles for a partner versus other key stakeholder roles (e.g., input provider, spokesperson). True partnership means an equal voice and say along the way. True partnership does not necessarily mean equal financial contribution, although contributions may come through other resources based on relative strengths. True partnership is about alignment on outcomes and shared responsibilities (i.e., relative roles to achieve outcomes).
	3. Identify strengths and relative deficits within the Hub or core team (e.g., limited understanding of local context) and seek out complementary partnerships that acknowledge these relative strengths and deficits.
	LQ2. How can relationships with the local community be incorporated into the process in an equitable and inclusive manner?
	4. Ensure representation that reflects the local community within the partner and stakeholder group. Identify and invest in relationships with partners and stakeholders from marginalized communities that have traditionally been left out of decision-making.
	5. Elevate local voices that represent the community as partners in the process.
	6. Focus on building relationships with partners and local stakeholders with a tone of humility and gratitude in communications and interactions. Doing so helps build the health and strength of community relationships and reduces their transactional nature.
	7. Acknowledge contributions and provide attribution.
	LQ3. What steps can be taken to support and drive increasing community ownership of the lifelong learning system post-launch?
	8. Research key community organizations and individuals who are leaders and trusted by each community. Invest in relationships with these organizations and leaders who may serve as relationship brokers. Engage in open dialogue to understand the needs of each community group, how to build trust, and how to reach the community.
	9. Engage community members and leaders to jointly brainstorm and address issues of access, engagement, and retention, including how to identify and mitigate barriers as well as naming the root causes behind those barriers.
	10. Facilitate focus groups and/or town halls to invite additional perspectives. When possible – and not creating a resource burden on communities – conduct meetings where communities are in order to build comfort and trust, rather than asking community members to come to the Hub or Core Team.
	11. Establish and plan to increasingly transfer ownership and responsibilities to local partners.

Building the Hub & Core Team	**LQ1. How can the core team supporting the lifelong learning system include the lived experiences of those the system aims to benefit?** 1. Ensure diversity of backgrounds and perspectives in the team's composition in a way that reflects the target population and geography. 2. Prioritize bringing community members onto the Hub team and sharing power and ownership in the process. Involve community members, especially people of color, in decision-making. **LQ2. How can the core team foster an inclusive culture and support ongoing learning on equity?** 3. Require and provide implicit bias, equity, and anti-racism training to all staff and team members. 4. Establish practices that regularly reinforce the principles of these trainings (e.g., regularly attending on-going trainings; regular cadence of open, honest conversations about how these principles are being applied. 5. Create accountability mechanisms to support and ensure regular practice, growth, and development on equity and inclusion (e.g., including equity principles and objectives/metrics into performance management and reviews, establishing an external Equity Advisory Board). 6. Engage in conversations about implicit biases, perceptions of the community (combined with sense making of the research on local demographics and history), and the perceived risks with taking a more intentional equity-focused approach (e.g., tension between a nimble/agile approach and pausing for reflection and incorporation of more perspectives).
Designing & Developing the App	**LQ1. How can the app best reflect the local community, including its assets and needs?** 1. Take a human- and community-centered approach to app conceptualization and design by focusing on the community's assets and needs and requirements, and involving the local community perspective in all steps of the process. 2. Ensure representation of diverse community members (based on the local demographic and history research) more directly in the design process – both as input providers as well as members of the design team. Share ownership with community members, and ensure they have direct, representative input as members of the design and local teams at all steps of the process. 3. Seek input from other community members throughout the process and do not rely on team members to fully represent a / their community. Be aware of intersectional identities as well and the different perspectives that team or community members may bring based on intersectionality (e.g., Black men and Black women have different perspectives; recent immigrants and fourth-generation members of the same community have different perspectives).

	LQ2. What do we need to know about the history of racism, sexism, ableism, and other root causes of discrimination and inequities in current technology design and development practices? How is this history manifesting in our practices and what steps do we need to take to reframe and incorporate a more inclusive and equitable design and development process for the app? 4. Invest time and resources in capacity building to develop an understanding of the history of racism in current technology design and development practices for the full design and development team. 5. Build in accountability measures and regular checkpoints to evaluate the degree to which these practices are applied or challenged in the design and development process for the lifelong learning system. 6. Ensure the design and feel (e.g., fonts, colors) of the app is inclusive of those with different abilities. 7. Design and conduct a beta test process that is representative of the local community, particularly with an emphasis on inclusion of members of target communities. **LQ3. What steps can help ensure the app continues to reflect the local context post-launch?** 8. Establish processes to update the app regularly based on user feedback. 9. Establish feedback loops to maintain a pulse on relevant local content. Consider and establish, to the degree possible, guidelines for when users are directed to content vs. front-page content is responsive to user interest.
Marketing & Outreach	**LQ1. Does the marketing and outreach plan reflect an understanding of the local context?** 1. Invest in establishing a strong understanding of the local community and demographics as a foundation for guiding marketing and outreach efforts, including time spent in the community by the team. Doing so will help ensure marketing and outreach messages and efforts are locally appropriate and do not unintentionally reinforce or contribute to harmful dynamics and inequities. 2. Explore relationships and marketing and outreach efforts that support equitable access within the community, particularly for target populations. If possible, partner with a local marketing organization with established and trusted relationships in the community. **LQ2. Are marketing and outreach efforts inclusive and equitable?** 3. Use different tactics for different groups. For example, populations experiencing barriers to technology may be best reached through in-person and word-of-mouth approaches and/or require bundled approaches that reduce or remove barriers (e.g., community Wi-Fi access). 4. Use language and images that reflect the local community, especially for targeted campaigns for specific groups.

	5. Test messaging and tactics with community members prior to release. 6. Engage a marketing partner that takes an explicit lens to evaluate messages and tactics for language and images that are offensive or have a history in racism, sexism, classism, ableism, or other forms of discrimination.

Designing & Implementing Evaluation & Ongoing Learning	**LQ1. What steps will help ensure an equity-focused evaluation and learning approach?**
	
	1. Build in evaluation and learning, with an explicit focus on equity, from the start of the initiative.
	2. Enlist third-party evaluators that have training in implicit bias and culturally competent evaluation practices.
	3. Embed the principles and practices in this document into the evaluation and learning work, including but not limited to:
	    • Ground all evaluation and learning processes in an understanding of the local history, demographics, and community context.
	    • Ensure a diverse and representative range of perspectives in data collection methods.
	    • Collect demographic data as a part of all data collection efforts.
	    • Disaggregate data and conduct analyses looking at differences between different identity groups.
	4. Continually evaluate access, engagement, and retention. Probe on the barriers that limit access, engagement, and retention. Identify root causes behind those barriers and prioritize addressing these root causes.
	5. Establish processes to adapt the design of the app, outreach efforts, partnerships, and in-person engagement based on ongoing learnings.

Establishing Ongoing Feedback Loops	**LQ1. What mechanisms can be employed to ensure time and opportunity to seek feedback (including on equity) in an ongoing manner?** 1. Ensure there are regular and consistent two-way feedback loops with partners and community stakeholders. These loops can be used to provide updates on the lifelong learning system, ongoing work, hear updates from partners, and create a channel for feedback. 2. Seek multiple perspectives from each community. Do not rely on 1-2 partners or stakeholders to represent the viewpoints of an entire group or sub-group (e.g., Latinx community, Black women). 3. Request specific feedback from partners and the community on the degree to which the Hub and Core team are centering equity in the lifelong learning system's processes. **LQ2. How can the collected feedback be used?** 4. Allocate time to pause, reflect, and correct work plans. Urgency and efficiency can leave out voices or overlook needed work to address concerns and acknowledge missteps. 5. Revisit and revise plans. Be adaptable and flexible to ongoing learnings (e.g., by engaging in developmental evaluation).

The purpose of the Community Shelf System is to support deeper learning through close collaboration with our program partners.

We do that by:

- Identifying learning needs and program goals
- Curating content to address those needs and goals
- Assisting program partners in supporting their learners
  - Fostering meaningful conversations around the learning
  - Providing KPIs on learner behavior to program leaders
  - Offering coaching for learners, as necessary
- Evaluating progress toward program goals

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Learner support process map

Assess → **Curate** → **Reflect** → **Apply** → **Spark** → **Evaluate**
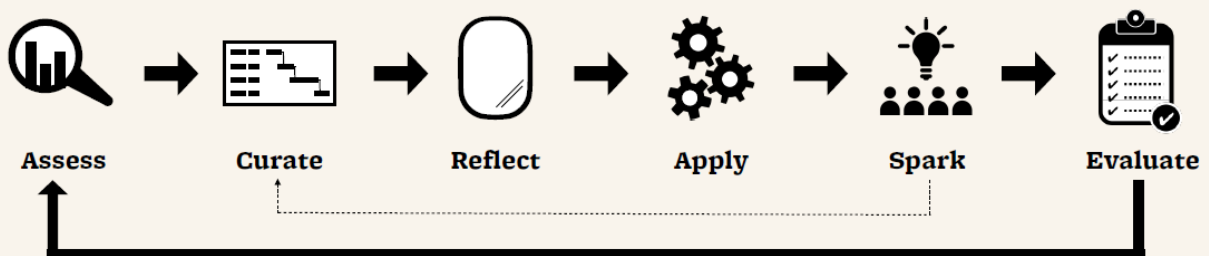
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Analyze

Identifying learning needs and program goals.

The Bendable team conducts a learning needs assessment for every Community Shelf partner.

This includes evaluating what those in the organization would most benefit from learning, as well as how they like to learn (for instance, in short bursts or in longer sessions).
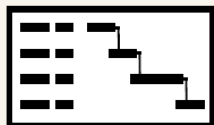
Curate

Co-develop learning plan with Shelf partners.

During this phase, the Bendable team matches learning content from our expansive catalog to the partner's identified learning needs.

Our Shelf partners always have the final say over what content is selected.

The arc, explained

After the content Shelf is completed and program participants begin learning, they will be sent a series of prompts, via text message, to help engage and support them.

"Reflect" prompts are designed to deepen a learner's understanding of key concepts.

"Apply" prompts are designed to facilitate the application of concepts and skills to new settings.

And "spark" prompts are designed to inspire and identify new learning interests.

Apply

Reflect

Spark

t
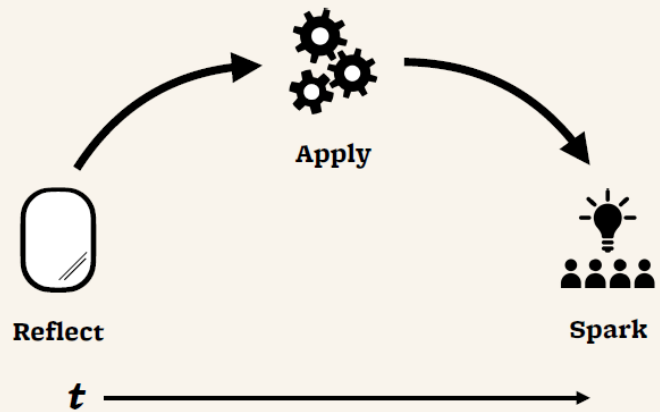
Reflect

Allow participants to reflect on their learning.

"Reflect" prompts integrate new concepts with existing knowledge.

They are meant to aid in self-regulated learning and to help coaches or supervisors support deeper learning through more meaningful conversations.

What's one thing you learned from the course you're working on?

List three key takeaways from what you've learned.

If you could share something from this course with a colleague, what would it be? Why?

Ensure participants can apply their learning.

Apply

This phase of the learning arc is meant to help learners generalize new concepts and skills beyond the curriculum and to recognize their value and application in their jobs and lives.

Why do you think the course you're currently taking was assigned to you?

How will you apply a new skill, strategy or concept from this course to your job or everyday life?

Think back over the past couple of months. What's something you would have done differently in your job or life in light of what you learned in your current Bendable course?

Discover what participants want to learn next.

Spark

"Spark" prompts help people see themselves as capable, continuous learners.
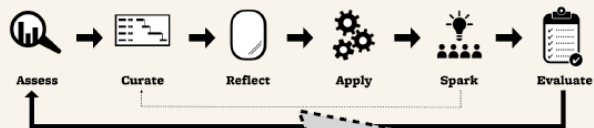
What's a new skill, strategy or concept that you think you might struggle with moving forward?

What's the most interesting thing you learned from the Bendable course you're currently taking?

Is there something you learned that sparked an interest in you to learn more about that topic? Describe the topic and what you're interested in learning now.

Gather intel for your next learning plan.

"Spark" prompts are shared with our program partners to help inform future learning plans.

Responding to the needs and interests articulated in these prompts provides an opportunity for program leaders to authentically listen to their learners, while fostering deeper engagement by the learners whose voices have been heard.
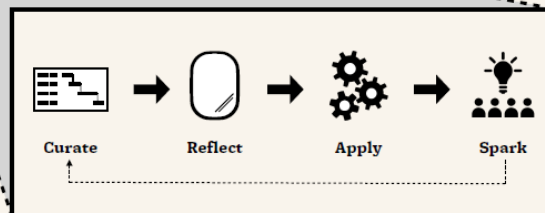
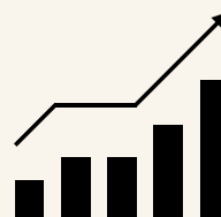# Coaching and KPIs

Beyond the prompts, the Bendable team can help program leaders support learners by providing key information (including when someone started a course, completed a course and last logged in).

We can also, in certain circumstances, provide access to virtual coaches who will check-in with learners and assist them in their journey.

Evaluate

Evaluate program goals.

As part of our commitment, the Bendable team will assist our Community Shelf partners in assessing progress toward their learning goals.

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FSG is a nonprofit consulting firm specializing in strategy, evaluation, and research, founded in 2000. Today, FSG works across sectors in every region of the world—partnering with foundations, corporations, nonprofits, and governments—to find new ways to achieve real results against society's toughest challenges. We combine practical advice with unconventional thinking to create a more equitable and sustainable future.