Collaborative Leadership Essentials

Gain the essential skills and habits needed to lead effective multi-stakeholder collaboration.

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Course Purpose & Outcomes

Purpose of this Course

To build participants' capacity for facilitating meetings for Networks and sub-teams, or for teams internal to your organization.

Proposed Course Outcomes

Connect	1. Deepen our collective collaborative leadership capabilities 2. Establish learning partnerships to deepen our skills
Align	1. Agree on a working definition of collaborative leadership and what it looks like in practice
Learn	Understand how to… 1. Set an intentional agenda 2. Set the context and pace in meetings 3. Shape the conversation and give direction during a meeting 4. Create a narrative for the group that builds momentum 5. Move from insight to work product
Make	1. A map of the tension between facilitation and leadership 2. Plans for our next group meetings and valuable work products for those groups

WHAT IS COLLABORATIVE LEADERSHIP?

Being a Collaborative Leader

Progression of Skill Building

Collaborative Leadership takes time and practice to achieve a level at which you can work competently without thinking. The first step is becoming aware of how your interventions impact a group that you're leading and then identifying areas for improvement. Working through that stage of conscious incompetence can be awkward and uncomfortable but it's the price we pay to achieve real competence in leading this work.

Unconscious Incompetence → Conscious Incompetence → Conscious Competence → Unconscious Competence

Choice Awareness Matrix

The Choice Awareness Matrix is a useful tool created by Edie Seashore to help us "use ourselves" more consciously as leaders and change agents.

When working with initiative groups and network, we often hear leaders who are concerned about the pace of the work and frustrated with the lack of accountability and engagement of network members, especially in initiative groups. However, we have often found that those leaders are facilitating and leading in ways that don't foster strong clarity and accountability.

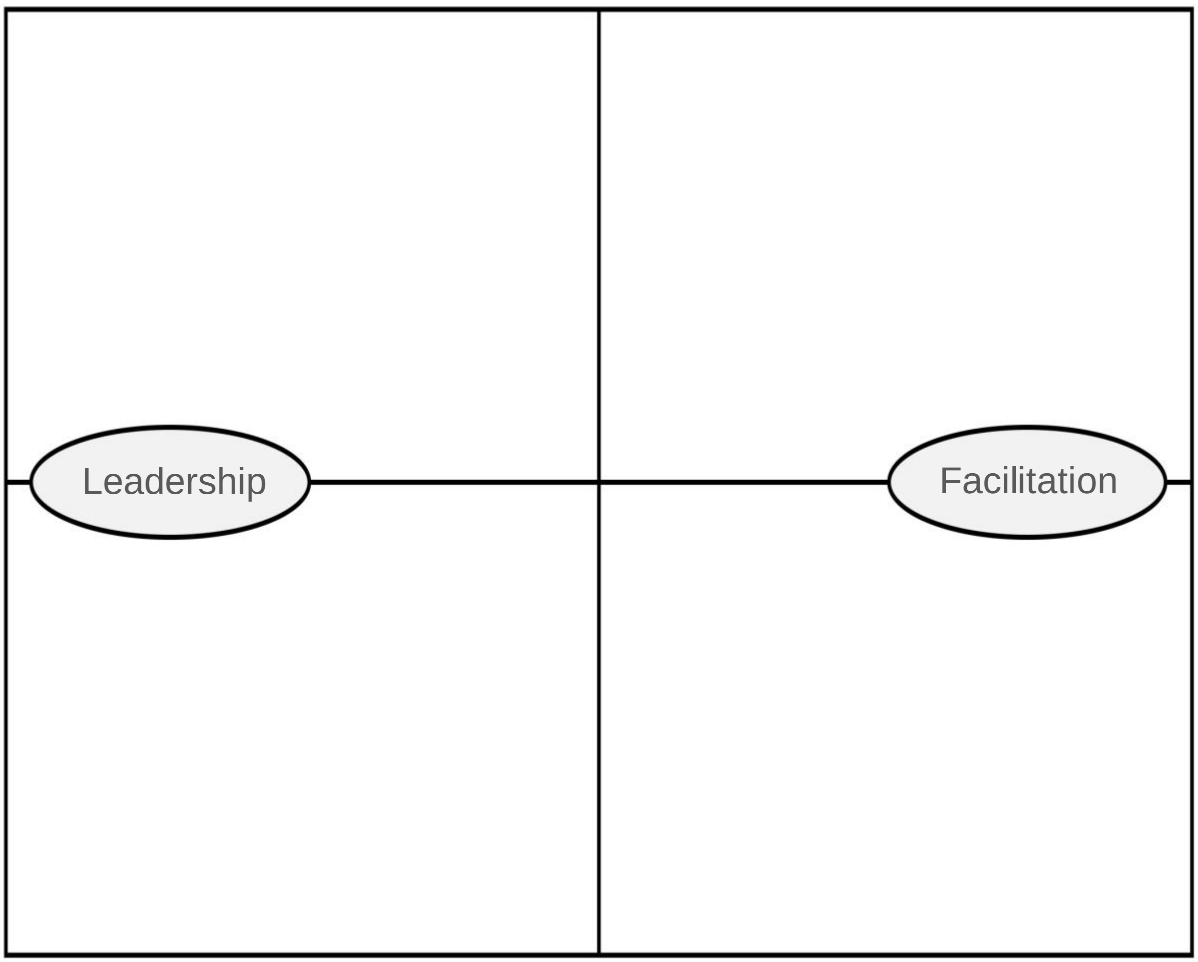
It's helpful to think of participant engagement as a dependent variable, something that is determined by how we lead the work and engage everyone meaningfully. That means being aware of the choices we're making about how we lead the work and taking personal responsibility for building greater engagement and momentum.

		Attribution of Outcomes	
		Self	Others
Awareness of Choice	Aware	**RESPONSIBILITY** When we are aware that we are making choices and we see the connection to outcomes… *we take responsibility for our role in creating better outcomes.*	**BLAME** When we assign our choices to others, and we make them responsible for the outcomes we experience… *we blame others for the outcomes we've helped create.*
	Unaware	**AUTOMATIC RESPONSE** When we are aware that we create a pattern of outcomes, but we don't see how our choices contribute to them… *we wonder why we keep creating unhelpful outcomes for ourselves.*	**SOCIALIZED RESPONSE** When we are unaware of our choices and we believe that others are responsible for the outcomes… *we see the outcomes as typical of "the way things are."*

EXERCISE: WHAT IS COLLABORATIVE LEADERSHIP?

It’s not just facilitating and it’s not just leading.
It’s intentionally leveraging the best of both.

At your table, map the polarity of leadership and facilitation:



REFLECTION: OBSERVED COLLABORATIVE LEADERSHIP

Instructions:

1. Think of a recent meeting that was facilitated by someone else.
2. What was one thing that person did as a facilitative leader before, during, and/or after the meeting that was valuable or impactful for the group?

3. How does this reflect being an intentional facilitative leader?

Building Trust

People need to trust you as the facilitator-leader of the group. What are the facets of that trust and how do you build it over time?

1. **"You understand my interests."** I trust you to keep my needs and interests in mind as we shape the work together. To get at people's underlying needs and interests, look BEHIND their questions and statements. For example, if someone asks a question, you might ask, "What prompted that question for you? Why do you ask?" to get at interest behind your question. Or if someone suggests doing something, you might ask, "Great, what would doing that get you?" The more you understand the underlying needs, assumptions and motivations of people, the more you can work directly with those and the more trust you'll gain.
2. **"You are competent."** I trust you to guide us through this challenge. This obviously requires that you demonstrate the kind of leadership that builds confidence in your ability to support them through this challenging work.
3. **"You include me meaningfully in the work."** Make sure you hear from everyone on every call and on every significant topic. When a few people dominate the conversation, intervene to make room for others.
4. **"You use my time effectively and efficiently.** "Don't make work any more complex than it needs to be—create simple templates and other tools, and facilitate efficient meetings (e.g. few "dead" spots on a call).
5. **"You see me as a real person."** When you clearly know the person and his or her responsibilities, needs, interests, and values, that goes a long way in building trust. That can pay off, for example, when they are frustrated with or alienated from the work of the group—they are more likely to share this openly with you than to just disengage.

EXERCISE: PUTTING BIAS IN ITS PLACE

The biggest threat to successful facilitation is unrecognized bias that we bring to the role. Bias, such as a deeply-held preference for a certain way of acting or being, is normal and healthy when we can recognize it and put it in its place. It's really unhelpful when we're blind to it and it distorts our vision of what's happening and what's needed in a group.

Try this exercise using the polarity thinking lens:

1. In each pair of values below, circle the value you prefer. For example, if you prefer Flexibility over Structure, circle "Flexibility."
2. Identify the single polarity in which you had the easiest time choosing a preferred value.
3. Draw a polarity grid, write the value name that was easiest to choose in in the left pole of your blank map, and write its partner value in the right pole. For example, if your easiest choice was "Doing" in the polarity, "Learning & Doing," then put "Doing" in the left pole and "Learning" in the right pole of your blank map.

Fast	&	Slow
Going Broad	&	Going Deep
Tight	&	Loose
Long-term	&	Short-term
Introversion	&	Extraversion
Data-driven	&	Intuitive
Learning	&	Doing
Doing work	&	Deepening relationships
Structure	&	Flexibility

4. Now pair up with another person (preferably someone who doesn't share your same preference on that polarity) and complete the four quadrants of the map.
5. Now discuss how this bias you hold has played out in your facilitation experience? Have you gotten feedback on this bias? What other insights does this way of looking at your favored value provided?

THE MEETING CYCLE

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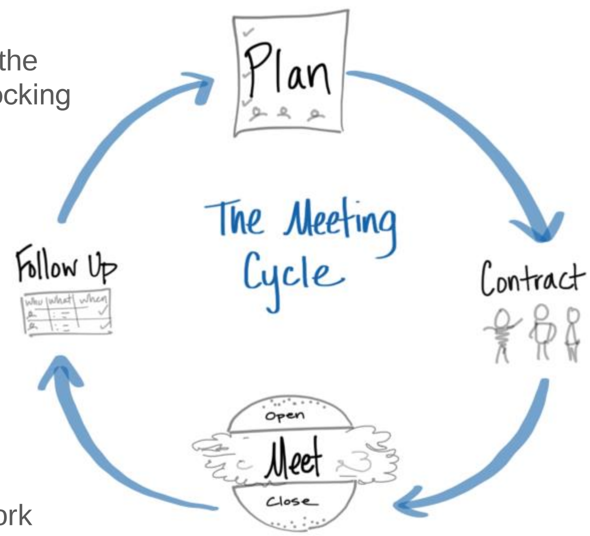
The Meeting Cycle

The meeting cycle is a simple way to help us maximize the value and benefit of each meeting by thinking of not just the meetings themselves but the critical work that happens around meetings.

6 Meeting Cycle Stages



1. **Plan.** We plan the next meeting, first defining the purpose and outcomes, drafting a flow (or "blocking the time"), then a detailed runsheet, and an agenda. Planning includes taking care of the logistics, space, and material needs for the meeting as well.
2. **Contract.** We contract with our co-facilitators, the Design Team, presenters, and the Network participants to ensure they are ready and willing to do the work we've set out together.
3. **Open.** We open the meeting by building connections among participants and aligning participants around the goal of their shared work and the purpose and outcomes for the specific meeting.
4. **Meet.** We run the meeting, which may consist of some combination of connecting participants in more trusting relationships, more deeply aligning their shared intent and analysis, learning about the system they are working to change and the experiences of people within that system, and making solutions and interventions.
5. **Close.** We close the meeting, ensuring that the path forward is clear, that people understand their roles and are committed to taking the work forward, and that we have recognized and fully appreciated what we've done together.
6. **Follow-up.** We shape the output of the meeting (usually with the Design Team), especially if the meeting involved a lot of strategy development, solution design, and/or planning. By "pulling up" the raw output of the meeting into more clear and coherent plans. We also connect with participants to ensure that they are clear on their tasks and deliverables, that we hear and address any concerns or confusion, and that the work is aligned with their needs, interests, and priorities.

The Meeting Cycle: Plan

Several preparatory actions will help you lead more effective meetings:

- ❑ **Schedule the meeting as far ahead as possible.** We usually schedule network meetings 6-9 months ahead to ensure that we can find good spaces and that we can schedule busy participants.
- ❑ **Define ONE primary purpose for each meeting.** This helps the group focus their energy and attention on the most important work rather than have it dissipate across many topics. Do this even if it's a regular network meeting because, at any given point, there is a unique purpose for each meeting of a Network, whether that is to develop the overall strategy or to learn more about critical topics.
- ❑ **Define concrete desired outcomes for the meeting** in each of the Four Agendas below.
- ❑ **Identify any key strategy or content questions you want the group to address** and make sure to include them in the agenda.
- ❑ **Confirm space, logistics, food, and materials early.**
- ❑ **Draft a meeting *FLOW* and test it with others on your team.** The first round is usually just blocking out times during the meeting time so we can test our thinking with others. If it's a Network meeting, we'll test the meeting purpose, outcomes, and the time blocks with the Design Team. If it's an Initiative Group meeting, we'll test and refine the meeting plan with the chair or co-chairs.
- ❑ **If the meeting is a half-day or longer, make a *RUNSHEET*.** Runsheets are presented as a table with each meeting session in a separate row showing the time, length, intent/outcome, lead, process, and materials needed. *See page 71 for an example runsheet.*
- ❑ **Contract with any presenters, session leads, or co-facilitators** to ensure that they understand the intent and process for the sessions they are involved in.
- ❑ **Send a logistics email or "greet guide" as soon as possible** so participants can plan their travel and accommodations.
- ❑ **Prepare any documents that will help participants prepare for the meeting.** We often send a short, highly visual presentation to prep participants before the meeting. We avoid, however, sending long pre-reads to participants because many participants don't read them, so they are not useful for ensuring shared learning and analysis. Instead, plan to cover the material in the meeting in some engaging way.
- ❑ **Send the agenda for the meeting**, preferably a week ahead of time so people have time to get oriented to what will happen. Make agendas visually simple and easily read, adding extra content below the agenda itself or in separate documents (though we tend to include everything in a single document to make it easier to access and review).

Clarify Your Intent

It's important to be clear with yourself and others about the level of engagement you are seeking from other stakeholders in the work. The *5 Levels of Engagement* is a helpful model to test and clarify your intent. The surest way to undermine trust with your allies and stakeholders is to act as if you're engaging them at a higher level than you actually are. If, for example, your organization is going to decide about the design the program or initiative and only consult with your external stakeholders, then you clearly shouldn't act as if you're engaging those stakeholders at Level 5.

		Now (existing forms)		Future (new forms)	
	Level 1	**Level 2**	**Level 3**	**Level 4**	**Level 5**
Impact on system	Understand	Improve[1]	Evolve[1]	Invent[1]	Transform[1]
Use of power[2]	Inform	Consult	Involve	Collaborate	Empower (sharing power)
Engagement method	One-way Communication	Arbitration or Direction (someone else decides)	Mediation/Negotiation	Collaboration/Interest-based negotiations/Design	Co-creation/Co-design
"My" experience	I was updated on the work	I gave my input into the work	I gave my input and it's clear that it was considered in the design	I know that my interests are helping to shape the design because I'm at the table	My interests helped shape the vision that's driving all the work
Often appropriate for		Shared Problems	Shared Concerns	Shared Interests	Shared Future
		Resolving conflict (e.g. over a shared resource)	Finding a more agreeable resolution to the focal problem	Designing a win-win solution to a complex shared problem	Co-designing and realizing the shared future we want to create together
Challenges	Making sure the communications "land" and are meaningful	Getting people to agree that the problem is a problem and that it's their problem too	Setting aside favored solutions to allow genuine collaboration	Building genuine empathy and interest in building the capacity of the whole community	Getting people to efficiently and effectively work together from a shared intent

[1] Levels of innovation from Cheskin Research
[2] From the International Association for Public Participation (IAP[2])

The Four Agendas

As you design each meeting, think about where the group needs to deepen its work across these four agendas and plan the session to deliver that.

Connecting (heart)	Are participants personally connected to each other, have real empathy for people in the system, and to why the work is important?
Aligning (spirit)	Do participants have a clear understanding of the problem and the dynamics that are contributing to that problem, and do they understand what the criteria of successful solutions or strategies are?
Learning (head)	Are participants aligned around a clear shift and goal or strategy? If not, then the other agendas won't matter. That said, we just need the shift, goal or strategy to be "good enough" for meaningful work to happen, and we'll test and refine them as the work goes forward.
Making (hands)	Are participants making tangible work products or strategic plans that embody their best thinking and drive more specific and focused learning?

Though we use the term here, we often avoid using the term "meetings" with certain networks because it makes people think of the conventional approach to a meeting: make an agenda, invite people, give updates, discuss things, maybe make a decision (or two) and close the meeting with next steps, all using Roberts Rules of Order. Pretty boring stuff.

Instead, intentionally design an interactive session that YOU would want to experience.

- By **design**, we mean treating the challenge as a design problem, not a planning problem.
- By **work session**, we mean designing a session at which people actively work through things together instead of just listening and discussing things at every meeting.
- By **experience**, we mean what it's like to actual participate in a session that you've designed. Start assessing your meeting design by sitting in the seats of people who will be participating and seeing what their experience will be. Design for an experience that's meaningful, engaging and productive—just like what you would like to experience yourself. How would you like to engage on the upcoming call? How might a specific participant experience this part of the meeting? It's amazing how assuming the stance of just one participant can provide useful insight into how to improve your meeting design.

TIP: Ban the term "conference" with your team.
If the work "meeting" conjures up boring, one-dimensional events, then "conference" can do even more harm. People often assume that they are coming to a network meeting to present on a panel or listen to others present, and maybe discuss things. We want people showing up ready to work together to advance concrete strategies and solutions.

Four Key Roles in any Meeting

Any successful meeting requires 4 key roles. These roles can be played by a single person but the more complex the meeting agenda, the more helpful it is to have each role played by a different person.

Assign these roles prior to the meeting if possible. When creating breakout groups in a network meeting, prompt the groups as their first task to assign a facilitator, timekeeper, and reporter.

Leader	Convenes the meeting and consistently holds the greater intent behind the meeting, especially when things get confusing. While in an organization, we often have formal leadership positions, in a network, the network director plays the leader role.
Facilitator	Helps the discussion and decision-making process move forward effectively in a way that leverages the collective wisdom of the group and builds alignment and commitment. The facilitator also ensures that tasks are assigned with deadlines for completion. Separating the leader and facilitator roles enables the leader to fully participate and focus on the content of the meeting rather than the process.
Recorder	Records key decisions and learning points by taking notes. In a virtual meeting, the recorder might take notes on the screen. In in-person meetings, the recorder takes notes on a flipchart or monitor screen to ensure that everyone can see and validate what's being recorded.
Timekeeper	Keeps track of time allocated for tasks and alerts the group when the pace is too slow to complete the agreed-upon agenda item.

Standard Meeting Elements

Establishing rituals and patterns early with groups pays real dividends later. For example, doing meaningful check-ins with groups quickly becomes a valued connecting ritual. Some of these practices may seem awkward at first. Just keep applying them until they become a natural way of working.

Item	Purpose	Script
The Meeting Cycle: Open		
Welcome/ Hello	Always start on time and with a friendly welcome to kick off the meeting. This marks the point at which the meeting is really starting and where people need to pay attention.	*"Hello everybody. I'm glad we're all here. And thanks for being on time!"*
Confirm meeting purpose and outcomes	To orient people to why we're doing this meeting, what we intend to make or achieve.	*"The purpose of today's meeting is to develop our Design Team's consultation plan. The three desired outcomes from this session are to: 1) Make and agree on a list of priority interviewees, 2) ID who will interview and take notes for each interview, 3) Review and modify the draft consultation guide. Are you willing to work with me to accomplish these things? Was there anything else you hoped to accomplish today?"*
Introductions	Do introductions whenever you have people join the group who don't know one another. Ask them to share something meaningful to deepen connections. Call on people by name to keep it moving and avoid long periods of waiting (plus, on the phone, people aren't sure when to go because they don't want to talk over other people, so you're doing them a favor by calling on them). One great introduction item for early meetings is to have them complete the sentence, "Call me if…" (that is, share your expertise…people should call you if X).	*"Let's go around and introduce ourselves. Share your name, name, organization and what you do there, and one thing that you love most about your work."*

Item	Purpose	Script
Check-ins	To connect people as human beings, not just their roles. Tip: Do more meaningful check-in topics in the first half-dozen meeting, then you can move to more fun ones. When doing check-ins, start with a participant, not a backbone staff member, then call on people and keep it moving it along.	*"One thing you're proud of in your work right now."* *"A highlight from your past week."* *"One thing you love about your community (or co-workers, or organization)"*
Updates	To allow people to share new developments, or information that might inform the group's work (and to allow them to let that go and be present).	*"Let's take a few minutes to share any urgent or important updates since we last met that might inform our work together."*
Review previous meeting/content/ previous work	To re-orient everyone to where we are in the process, what we've accomplished, what's outstanding or still open, and what might come next.	*The "Tour Guide" Approach: Here's what we've done, here's what we'll do today and here's what's coming next.*
Review agenda	To confirm our plan for the meeting.	*"In order to accomplish our purpose and desired outcomes, here's how we're proposing we use our time today…[review agenda items]."*
Review Agreements	If this is an early meeting of the group, it's important to confirm the agreements that the group is working under.	*Review list of agreements and ask, "Are you all willing to uphold these agreements today?"*
Give task reports	An opportunity for people to report on what they agreed to do and the status. Set a good pace on these and keep them moving because they can be deadly to a group's energy. They can be helpful but usually aren't critical.	*"Let's do really quick updates on assignments—no more than 1 minute each and if any of them need discussion, we'll add that to the agenda."*
The Meeting Cycle: Meet		
Work Items	These are the actual work tasks for the meeting and form the bulk of the meeting time. They should be meaningful and specific about what the group is going to do or decide on each item, and you should have as few work items as possible.	

Item	Purpose	Script
Summary	Sum up what has been decided on the call and "ratify" your summary with the group.	*"Is that what we've decided?" or "Sound good to everyone?"*
The Meeting Cycle: Close		
Next Steps	Specify who's doing what, by when.	*Chart these so everyone can see them; you can use a table template to catch and track items throughout the meeting.*
Evaluate meeting	Every 4th meeting or so and for every large group meeting, add in a QUICK meeting evaluation. People will appreciate you asking, you can improve meetings, and people can vent if needed.	*"What worked?"* *"What should we do differently next time?"*
Check Out	To bring a sense of connectedness and final closure to the session.	*"Okay, let's go around and hear from each of us one thing that we appreciated about our work together today."*

Setting the Space

Types of Spaces

Design the space to reflect and support the type of work the group will do together in that meeting. If you want interactive work, then set up the space for that—not for a lecture format. Changing the space over time also helps the group gain new perspectives on the work and adds more depth and dimension to their relationships.

1. **Learning space:** Usually classroom style to fit more people in, with some leading the teaching or discussion.
2. **Discussion space.** Usually a circle to maximize sightlines, usually open at one end for flipcharts and/or presentations
3. **Work space:** Tables with 4-6 chairs around and work materials.

TIP: Use our Session Configurator to ensure that you have the right room configuration and the right materials for your meeting.

Satisfying all the Senses

Sight

Good sightlines enable everyone to see everyone else without straining. For example, seat in a circle or at least avoid spaces with large pillars.

Natural light means that I can see well and have good energy throughout the day—don't underestimate the impact of this!

I can read the flipcharts and post-its (sharpies, not pens on post-its!)

The way the space is set up indicates that my voice will be heard and respected.

There are only enough empty chairs for the people who are still expected to arrive. (But note that a room with too many empty chairs implies lack of interest!)

Taste

I have water (at least) and healthy snacks to keep up my energy.

Hearing

There are no distracting background noises, including heating or air conditioning sounds.

Don't Settle!

If the space doesn't meet these criteria or isn't set up for the type of work you want to do in that session, change it. Do NOT accept a limiting space just because you're hesitant to mix up the layout of the room. Making the space support the intended work is part of being a facilitative leader.

EXERCISE: PLAN YOUR TEAM'S NEXT MEETING

Instructions:

Use the template below to plan the agenda for your next internal team meeting. This is a real meeting that your team will have TODAY.

Date: _____________ Start time: _____________ End time: _____________

Location: ______________________________ Facilitator: _____________

Notetaker: _____________ Timekeeper: _____________

Proposed Meeting Purpose

Proposed Meeting Outcomes

Connecting	1. 2.
Aligning	3. 4.
Learning	5. 6.
Making	7. 8.

Key Participants:

Agenda

Time	Intent	Lead	How
	Connecting & Aligning		▪ Hello/Welcome (0 minutes) ▪ Meeting purpose (1 minute) ▪ Introductions or Check-ins (as needed)
	Aligning: Purpose, outcomes, agenda, agreements		▪ Set the meeting in context ▪ Review meeting purpose and outcomes (2 minutes) ▪ Review agenda (2 minutes) ▪ Review agreements (if needed)
	Learning: Critical Updates		▪ Round-robin or popcorn-style (5 minutes)
	Aligning: Next Meeting		▪ Plan for next meeting (Date, Time, Length, Location, Facilitator) (2 minute)
	Close		▪ Summarize & review today's commitments (5 minutes) ▪ Review (or ID) Next Steps: Who, What, By When (2 minutes) ▪ Evaluate meeting (occasionally, using Plus-Delta) (2-3 minutes)

Other potential agenda items to include above

- ❑ Review previous meeting/content/previous work — 2 minutes
- ❑ Give work reports/updates — _____ minutes
- ❑ Focus item (name it and describe if needed) — _____ minutes
- ❑ Secondary item (name it and describe if needed) — _____ minutes
- ❑ Other item (name it) — _____ minutes
- ❑ Other item (name it) — _____ minutes

The Meeting Cycle: Contract

What is Contracting?

“Contracting” refers to establishing agreements among stakeholders. In Collaborative Leadership, it’s a key task in ensuring that network and initiative group participants understand their role and know what they are expected to contribute and why.

Contracting happens continually and we as leaders and facilitators of the network need to ensure that we are clearly and proactively contracting with all key stakeholders. At times, that contracting is specific to a participant’s role in a specific meeting. At other times, we are contracting with participants about their role in the larger work of the network.

Contracting involves ensuring alignment in three key areas:

1. **Intent.** Ensuring that the goal of the network is clear and shared, that any initiative group is clear about what shift it is working on, and that the Program Team, facilitators, and participants are aligned about the purpose and desired outcomes for any given meeting.
2. **Behaviors.** Ensuring that all key stakeholders in the work are doing what they agree to do, showing up with collaborative and inclusive behaviors, and taking collective ownership for moving the work forward with appropriate speed and scale.
3. **Messages.** Ensuring that we are collectively aligned around any key messages from the network as a whole (e.g. what is our public identity and public message, if any), from the Design Team (e.g. what messages are we bringing to the network about our work together), and the Program Team.

Key Roles to Contract

Program Team	What is my unique role and set of responsibilities in the Program Team? What am I uniquely responsible for in network meetings, participant cultivation and engagement, and the development of initiatives?
Co-facilitators	Who’s leading which part of the network or initiative group meeting, what is the intent and pace for each part of the session, and how will we adapt to changes that need to happen during the session?
Design Team Members	What is our role in shaping the intent of the network; in modeling engaged, collaborative, and inclusive behaviors; and in ensuring that the work is proceeding at a pace that’s in line with the network’s overall goal? What messages and behaviors does the Design Team need to advance now to support momentum and clarity across the network?
Meeting presenters	What are the intended impact and outcomes for the session I’m contributing to, and what messages are important for the network participants to hear right now?
Network participants	What is my unique role in the network and what pieces of the initiative group work am I accountable for delivering, by when?
Initiative Group Chairs	Am I holding the intent for this initiative group? What messages and behaviors does the group need from me to advance this work?

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The Meeting Cycle: Open

Welcome Participants

Friendly and authoritative are always a better combination than dull and administrative! If people tend to join late (for example, on online meetings), welcome people as they join and say their names. Let everyone know that you'll start the meeting at 5 after.

Set the Meeting in Context: Tour Guiding

To orient everyone to the greater context for a meeting, we employ a process that our partner and colleague Alisa Gravitz calls "Tour Guiding." In tour guiding a group, you place the meeting into the larger context and flow of the group's work together, for example:

> "I want to start by setting some context so we're all on the same page for this meeting. This group was formed with the intent to drive a shift from farmers not knowing how to sequester carbon in the soil to farmers understanding the methods, tools, and analysis to support planned carbon sequestration. So far, we've interviewed 50 farmers about their understanding and experiences with planned carbon sequestration, created a list of methods and tools (which we vetted with soil experts), and prototyped a program to educate farmers on these through the national soil conservation service. We now need to create a roadmap for piloting that program before May so we're drafting that at this meeting. Once we've piloted and refined the program, we'll then work on strategies for scaling it nationally."

Clearly, you shouldn't tour guide at each weekly meeting of a team, but if a team meets every three weeks or even less often, or if you've had new people join the team, tour guiding helps ensure that everyone is aligned around the context, status, and next steps in the work.

Confirm Meeting Purpose and Outcomes

These should be on the printed agenda. If you're in a room together, put the meeting purpose on a projector or flipchart, read it out, and explicitly confirm it with the group (we sometimes use the analogy of making sure you're on the right flight). If you're on a virtual meeting, share it on the screen with everyone, read it out, and confirm it.

For the meeting outcomes (since there are usually 6 or more for longer meetings), give people a minute to review them and then ask, "Is there anything you might add or change to the desired outcomes for this meeting?" If people are joining by phone and don't have them handy, then read through them.

The idea here is to "go slow to go fast" by ensuring that people are truly on the same page about what they are setting out to do together. If they are there for different reasons and you don't identify this, it will slow down the rest of the meeting.

Do Introductions/Check-ins

Nothing is more off-putting in a meeting than getting into work with someone you don't know at all. "Who is the person? Can I trust her? Why is she here?" are questions that arise in people's minds, especially when conflict arises or tensions emerge. Spending the time to Connect people together in trusting relationships pays real dividends for the work over time.

In fact, a study of change initiatives in school systems found that the level of relational trust among people involved was the primary determinant of success.

Here's our rule of thumb: If two or more people on the call or in the meeting haven't yet met, then do introductions. If everyone has met, then do check-ins.

Introductions

Introductions usually consist of going around the room (whether physical or virtual) and having each participant share his or her name, organization, a line about their role there, and something about how they relate to this work. That last piece might include prompts like:

- Share one value that brings you to this work.
- Share one gift you bring to this work by finishing the sentence, "Call me if…"
- Share one thing you want to get out of this meeting.

Check-ins

Check-ins are brief statements from each team member about how he or she is doing in general, outside the group's work. Check-ins can help team members set aside other concerns, reconnect with other team members, and help everyone become more aware of current team dynamics.

Check-ins might be something like, "I have a lot more prep to do for my client presentation tomorrow so if I'm a little distracted here, it's because I'm still trying to finalize that," or, "I'm feeling good and I'm ready to get to work on this." Effective teams recognize that people are human beings with real lives, and they provide ways for team members to understand and support one another.

Facilitator: "Okay, let's do quick check-ins. Let's do one sentence on how everyone is feeling about the great weather…Great, thanks. Is there anything else that anyone wants to add to their check in before we start?"

TIP: See the appendix on page 67 for a list of check-in prompts.

Good Practices for Check-ins

1. Do consistently and get groups used to them early.
2. Start with ones that allow people to share significant things about themselves, what they're good at, what they value.
3. Do more meaningful check-in topics in the first half-dozen calls, then you can move to more fun ones. When doing check-ins, start with a participant, not a Program Team member, then call on people by name to keep it moving it along.
4. Do as tweets or one sentence if pressed for time.

Review Agenda

Briefly walk through the agenda and make sure participants understand it and agree with it. Find out if there are any items to add. Effective teams are clear and deliberate about what they need to do together at any given time.

Facilitator: "Okay, let's review the agenda. I have X, Y, and Z for today. Did I miss anything? …Is everything clear? …Okay, let's just confirm the times on these."

For longer network meetings, we often create a visual flow on a flipchart and refer back to that throughout the meeting. This is a form of "tour guiding" in which you show what we've done so far and where we're doing now in the overall flow of the meeting.

Establish Agreements

It's important to establish agreements that the group is operating under early on, and to reaffirm those agreements—both verbally and in practice—until they are second-nature to the group.

There is no one-size fits all when it comes to group agreements. Since different groups have different people, they have different dynamics and, since they have different dynamics, they need different agreements. Agreements should always be specific to the particular group you're working with.

Facilitator: "Let's review these agreements…Okay, is there anything you might add or change on the list of agreements? …good enough to proceed? …great!"

Here we offer two very different sets of possible group agreements:

Agreements, v1

This is our more standard set of agreements that we start from for multistakeholder collaborations.

- Be spicy & brief!
- All take leadership (e.g. for putting concerns, issues on the table)
- Act from generosity (i.e. it will take more than our collective self-interests to succeed)
- Welcome disagreement, without being disagreeable
- Confidentiality (Chatham House Rule, but can ask for info to stay in the group and can ask directly for permission to attribute info to them)
- Don't worry about time, but support the schedule
- Be present, this is an active process
- Write legibly!!

Agreements, v2

A more sophisticated set of agreements that we use for more advanced collaboration contexts. (Also a bit groovier, if you're into that.)

- All of us are smarter than any of us.
- Our lives are more than our work and our work is more than our jobs.
- Each of us is a whole person trying to do well for ourselves, our communities, and the world we live in.
- Even if we share the same goals, we can reasonably have diverse and even divergent ways of driving change.
- Each of our perspectives contains fundamental truths and value, and none of our perspectives is the whole truth.
- We never encounter the same person twice, as each of us is continually learning, adapting, and evolving.
- We must differentiate before we try to integrate our distinct perspectives, experiences, and values.

- By aligning around our shared values and common interests, we can design better solutions together.
- We are both rational and emotional beings. We can skillfully leverage both to strengthen the quality of everyone's thinking, relationships and contributions.

Other possible Agreements

You might also select from the following additional agreements based on the needs of the group. Note that you shouldn't have more than 10 or so.

- Equalize airtime (use balancing hands to signal)
- Listen as an ally (make sure you really understand before you react)
- Use wavy hands for disagreement

Using "Meeting Sign Language"

It can be helpful to use hand signs to signal certain things, since intervening verbally can be disruptive (and uncomfortable when you have to interrupt a person). Here are two signs we sometimes use:

Balance the speaking time. Hold one hand down with the palm facing up, and the other hand up with the palm facing down, then bring them to level.

Indicated Agreement. Ask people to indicate agreement by waving their (open) hands in the air. This is the American Sign Language sign for clapping.

Facilitator Permissions

If you believe that the session might be unusually tough for some reason, you might want to also ask for specific permissions as the facilitator. Those might include:

- To stop discussion and have people move forward so we can keep the pace of work
- To signal an imbalance in speaking time
- To re-energize the group if needed
- To focus the group if needed

Updates/Collective Intelligence

Updates are a quick, casual sharing of new information or news that might be helpful for the other group members. On Initiative Group meetings, we will usually do these popcorn-style.

Facilitator: "Okay, who has any quick updates that might inform our work together today?"

In Network meetings, instead of updates, we often do a more involved Collective Intelligence session early in the meeting in which people share news, research, and information that might inform the group's work at the meeting. In industry supply chain networks, we refer to this session as "Market Intelligence."

We will sometimes contract before the meeting with a handful of participants whom we know have interesting and useful updates to share during the Collective Intelligence session, and we'll have those folks share first to "prime the pump" for everyone else. Collective Intelligence sessions for a two-day meeting can be as long as 90 minutes.

Facilitator: "Now we're entering the collective intelligence session where we share updates, news, and information that might inform our work together. We've asked X, Y and Z to share a bit on [these topics] and then we'll go around and hear from everyone."

CoCreative™

EXERCISE: ROLE PLAY

Instructions

1. Break into 2 groups
2. We'll assign questions to each group:
   - How will we engage the whole community in X initiative?
   - How will we communicate the impact of X in our community?
3. Once in your group:
   - Be yourself. This is not pretend.
   - Select someone to begin a meeting. Skip the check ins, updates, etc. The selected facilitator has 10 minutes to frame up and lead the meeting.
   - Have three people turn outward from the circle and pretend that these folks are joining by phone.
   - You can assume a role as a certain archetypical participant (talking too much, being silent, asking questions, etc.), but make it realistic and a reflection of what you really experience.
   - Be both a participant and observer – you can jot down notes below
4. Switch and have someone else in the group begin a meeting. Repeat instructions above.

Debriefing

As you debrief the practice session with your team members, focus on the process and dialog, not the content.

- ❑ What worked?
- ❑ What was less effective?
- ❑ What was productive?
- ❑ What was confusing?

REFLECTION: INSIGHTS FROM TODAY

What new insights have I gained so far today about facilitation in general?

What new insights have I gained so far today about my own facilitation?

What new insights have I gained so far today on practices I want to take forward in my work?

Supporting Early Success

Network: Confirm the Intent

At the first meetings of a network, it's important to affirm and reaffirm the working intent for the group. That includes:

1. The working goal
2. The scope
3. What's in focus and what's in frame
4. Definitions of key terms

These elements should be adjusted as needed in the first meeting until it's good enough for the group to proceed, a process that can sometimes take 90 minutes depending on how much pre-work you've done on this with participants.

Then revisit and refine the intent at each meeting. In the second and third network meetings, you'll likely still be shaping the goal and scope a bit. After that, the Design Team should watch for when the intent is no longer reflective of the evolving thinking of the network and propose adjustments or even entire revisions to the intent as needed.

Initiative Groups: Confirm the Critical Shift

In the first meetings of an initiative group, ensure that each member of the program team agrees on the shift, has the same definition of key terms in the shift, and that the shift is meaningful, clear, and necessary to achieve the network's goal.

Questions:

- ❑ What is the critical shift this group is working on?
- ❑ What do the terms used in that shift mean to each person? Do we need to reconcile various definitions?
- ❑ What's the worst outcome if we don't achieve that shift? Is it necessary and critical or just nice to have?
- ❑ How does this shift support or sync with the work of the other Program teams?
- ❑ Is this still the shift that we need to make happen?
- ❑ What scope of work does this shift imply? For example, what types of things might we do or not do to make this shift happen?

Periodically Revisit the Critical Shift

As groups create work products, their thinking will mature and potentially even evolve away from their original critical shift. As groups make decisions based on the work products they create, periodically revisit the critical shift with the group and test it against their current thinking. Ask them if they feel like their work products still put them on track toward making that shift happen. If not, is it intentional? Facilitate a discussion around whether or not the shift needs to be updated. If it does need updating, make sure to raise the issue with the larger group to ensure everyone is on board with the new direction.

Establish Roles Early

As soon as possible, identify a Design Team for your network and 1-2 chairs for each initiative group, people who seem to be highly engaged in the work of the group and who express leadership. Recruit them outside a call and then ask them during an initiative group call to step into these roles. See our *Collaborative Innovation Essentials* course materials for more on the role of IG chairs.

TIP: Build the Leadership of Participants	DON'T allow the work or conversation to become backbone-centered. Having backbone staff dominate or lead the content too much, especially to the neglect of drawing in participants, leads to disengagement of participants.	DO draw out the leadership of participants and actively work from their needs, interests, information and experiences. Cast them as the heroes of the story and us as their trusted sidekicks.

Learning in Initiative Groups

Initiative Groups, just like the network, can bring in experts and others to help inform their analysis and learning. Don't assume that the small group knows everything they need to know to understand their challenge or design effective solutions.

Coordinating across Initiatives

As the programs and projects progress in their work, you (and the design team at some points) should be looking across the whole set of activities to assess them as a whole. Questions you might ask include:

1. Is this set of solutions comprehensive?
2. Is the set sufficient? When added together, do they put us on track to achieving our goal?
3. Are they distinct? Are there any redundancies or overlaps that we should address?
4. Is each solution necessary to achieving the goal of the network?
5. Are there any obvious efficiencies or integration points?
6. Is there an obvious organizing nexus? Could one group's work provide an organization framework for the others?

BUT resist the temptation to integrate too much or too early. It's perfectively okay—and often better—to advance a loosely coordinated set of initiatives with minimal dependencies than to try to force the initiatives into your idea of coherences.

Helping an Initiative Group Assess Itself

At about meeting 3 or 4, have each Initiative Group do a self-assessment. This gives the members an opportunity to change the way they are working, and for individual members to raise concerns that they might not have felt comfortable raising while focusing on the work.

First, have each design team member write down individual thoughts on:

1. What’s working for you about how this team is currently working together?
2. What one thing do you think most needs to change about how this team is working together?
3. What is the ultimate goal of this team’s work?
4. What is the current priority of this team?

Then share their responses, question by question.

Pull up and share back the themes, confirming and refining them with the group.

Then: “Okay, is there anything we need to change about how we’re working together?”

DON’T focus on what initiative group members have not gotten done.	DO celebrate accomplishments and focus on HOW the work will get done.
DON’T hope that coherence and direction will emerge spontaneously or organically (or just “show up” on the call).	DO design and pre-test methods and tools before the meeting to drive coherence and direction.
DON’T allow an initiative group to work in isolation, without insight into the broader effort.	DO include spicy and brief updates on the work of other initiative group to build excitement about the larger work, enable groups to find coordination/ integration points, and avoid redundancy.

The Meeting Cycle: Work

Ensuring Equity & Inclusion: Start Early!

Establishing values and practices around equity and inclusion early in the lives of your groups makes it easier to embed these into group's culture and practice over time. Here are six strategies that help do that:

1. **Be intentional when selecting participants.** At the very least, any group working on a specific issue should be a fractal of the overall population that's involved in, working on, <u>and</u> impacted by that issue. Consider especially those people who need to be involved to represent the voice of lived experience, not just expertise, around an issue. In many initiatives focused on social issues, these are people who are experiencing the most isolation, exclusion, disenfranchisement, and/or prejudice.
2. **Avoid singletons.** In our terminology, a "singleton" is any one person who's expected to somehow represent an entire population's experience in your group. As much as possible, avoid creating groups with singletons. Be mindful too, when creating breakout groups, because people in minority groups in a given community might have to show up as singletons in order to ensure diversity in smaller workgroups.
3. **Recruit and onboard equitably.** Don't assume that everyone feels welcome into the work just because they were invited. Extending the same invitation to everyone and onboarding everyone the same is equal, but not equitable, because some people need more context, background, and sometimes support to be comfortable showing up in a collaboration. While taking care not to patronize participants, it's important to provide people with the support, context, information, and understanding of the terminology they believe they need in order to participate meaningfully.
4. **Avoid drops.** A "drop" is when someone shares an opinion, idea, or experience with the group, no one responds, and the group moves on. Drops are serious blockers to meaningful contact and connection. Even a response of "I heard you but that's not what we're doing right now," while not the most diplomatic, is still a form of clear and meaningful contact. At the same time, be sure to also avoid the dynamic where the entire group over-focuses on one person's experiences or statements to the neglect of building out a fuller shared view of what's going on and what's possible.
5. **Scan for visual cues.** Even as you're helping the group shape its analysis, identify possible pathways, and form plans, scan the group's energy, airtime, and body language to track possible undercurrents, biases, and dynamics. For example, if a person is sitting back from the group with his or her arms crossed, listen to what the person is saying and try to make sense of the words relative to their visual cues. While it's important to hold your assumptions lightly, at some point, you might want to check in with that person if you think they're pulling away from the group.
6. **Be aware of your own visual cues.** If you tend to focus visually on certain people and not others, you're sending a clear message that you're more interested in certain people's perspectives, whether you are or not. Standing or sitting in a open stance, facing the person who's talking, and moving around the group can help avoid the appearance of bias. One note, however: If people are tending to talk to you when they speak, you're at risk of becoming the "container" for the group. Either look at the rest of

the group (because no one likes to speak to someone who's not looking at them) or, preferably, say gently, "Please speak to the group and not to me."

7. **Observe facts to the group.** Making observations without judgements can be a really helpful and supportive way to increase the group's awareness. Example: "I want to note that in the past 10 minutes, we haven't heard from a single woman in this group." If you want to be more directive (for example, when you don't have time for the group to make sense of what you just said!), follow your observation with a simple instruction like, "I want to hear from the women in the group now."

Building a Culture of Accountability: Start Early!

The work of building accountability in your network starts early and runs through the entire Meeting Cycle. You need and want to establish a pattern early of people delivering on their commitments so that this becomes part of the culture of the network.

1. **Start building a culture of accountability before the first meeting**. When you are planning a meeting and contracting with members to participate (including, for example, recruiting them for an initiative group), part of that process includes confirming they can commit time and resources needed to make the group successful. Make expectations up front and as clear as possible about likely time and funding commitments.
2. Once the Network is launched and people make commitments to get work done in a meeting, **follow up with them and remind them**. When you call and email someone to make sure he will deliver that document on Tuesday, that sends a powerful message that he is being held accountable for his commitments. And when people see others delivering on their commitments (or not), they will do the same. Do whatever you need to do—early and often—to ensure that they deliver on time as much as possible.
3. **Don't focus meeting updates on what has not been done.** If someone hasn't done something they committed to do, simply note that, get a new delivery date, confirm that they can deliver by that date, and specify to whom they will send the deliverable. Then follow up with them afterward! But do not spend the group's time on a task that one person did not get done.
4. **When people deliver, celebrate it!** Part of the reward of working in a network, especially if participation in that network is beyond the responsibilities of my regular job, is the satisfaction of doing good work with people whom I respect. When my work gets recognized and appreciated by those peers, that's valuable to me.
5. **That said, if the group members fall into a pattern of not doing what they say they're going to do, observe this to the group.** For example, "I'm noticing a pattern of us committing to do things before the next meeting and not doing them. I'm concerned that this will impair our work together. Do you all share this concern?"

But remember: Deep accountability emerges only when people feel like they are contributing meaningfully to meaningful work. Don't expect engagement and accountability from people who are being asked to contribute in marginal or transactional ways.

Eliciting Engagement: Start Early!

1. **Pay attention to the energy throughout the meeting**, including the pace that you set at the beginning.
2. **Engage people early on by asking them to speak by calling on them individually.** Ask Network participants to speak first, before backbone staff. When asking for opinions, call on Network members by name to prompt their participation.
3. **Keep updates at the beginning of a meeting very brief.** Feature updates that will elicit excitement and momentum. You can have written updates in the agenda email they can read before or later.
4. **Get into the meat of the meeting as soon as possible.** This is why the people are participating and this will engage them the most.
5. **Ask open ended, clear, directive, and engaging questions about content and strategy.** "Ted said X, what does everyone think about that?" Use yes/no questions only to test or make decisions.
6. **For Design Teams, only ask them to make decisions or give input on strategic issues.** Spend the bulk of the time with them on content and strategy.
7. **Ask participants to speak to the whole group, not to you.**
8. **Watch for pairing, where two people start to build something, or debate something, while excluding the rest of the group.** Politely ask the two to remain silent for 5-10 minutes as you go around to hear from everyone else.
9. **The Program Team can make the decisions around logistics.** Inform and test for agreement on logistical questions at the end of the meeting.
10. **Don't do all the talking to fill the silent moments during a meeting or after asking a question.** If no-one responds to a question, just wait or call on people by name.
11. **And remember: Whenever you tell a group to do something, say it with confidence!** (and then say, "Does that sound good?" :)

Shaping & Guiding the Conversation

Collaborative Leadership is about moving from leading meetings in a transactional way (just going through the agenda) to leading meetings in a strategic way (doing substantial work and deepening the meaning of the work for everyone).

Every question or statement you make in a network meeting is an intervention. As a facilitative leader, you should always ask yourself, "Is this going to help the group based on where they are right now?" If it's not, don't say it. Everyone else can just show up and talk but we have to shape and lead.

Here are several ways to shape and guide a conversation:

- Share and Cluster Post-its
- Use Notetaking as a Guide
- Reframe Tensions
- Test for Segments or Personas
- Gain Deeper Understanding
- Check Back to the Data & Intent
- Frame up and Summarize
- Present Decision Points

Share and Cluster Post-its

You can use post-its to help the group quickly share and theme their thinking. This is especially good for helping groups work rather than discuss things.

Say, for example, that you want to identify the big barriers we're facing in our work together right now. One way to approach this is to just start talking about the barriers while you record what people are saying. There are several shortcomings in this approach:

1. Whatever someone says first becomes the focal barrier even if it's not the most critical barrier the group is facing.
2. The group may not even identify all the key barriers because they got into discussing a few of them.
3. The group will spend a lot of time on the barriers that a few influential people believe are more important, even if the group as a whole has a different opinion.

Instead, ask participants to work individually first and silently generate as many barriers as they can think of. Then ask one person to read one of his or her barriers aloud and put that post-it on the wall. Then ask others who had essentially the same barrier to add their post-its to that one. Then move to the next person and follow the same process until everyone has put up all their barriers.

Using this real-time clustering process, everyone gets to participate, you capture all the likely barriers, and do it quickly, and every barrier gets considered. Even better, you'll see that a few barriers were identified by a large number of participants, so these are naturally barriers to focus on and further define first.

Use Notetaking to Guide the Conversation

1. **You are ideally taking notes on a whiteboard, flipchart, large paper, or screen so that participants can see them during the meeting**[3], but don't just stop at recording the conversation of the initiative group verbatim. It is important to use people's words when taking notes so they can see their voice reflected in the product. You should also listen for and identify themes and patterns that emerge—capturing and shaping the thinking of the group, testing it with folks as you develop it. This synthesizing function of notetaking helps the group make sense of the whole.
2. **For virtual meetings, we suggest using PowerPoint or Sheets instead of Word or Docs (if you're adept in those apps)**, making tables, graphs, Venn diagrams, etc. to reflect the group's analysis, frame up or shape up a work product. An iPad with a drawing app works well too if you're more comfortable with sketching and handwriting notes.
3. **It's good to provide further clarity and definition or even evolve the group's thinking in the meeting notes.** This is your opportunity to shape their thinking more with your leadership eye but be sure to stay aligned to the group's emerging thinking and analysis!
4. **Notetaking actually has many purposes, the least valuable of which is recording what people said (though that's also valuable!).**

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[3] Michael Doyle and David Strauss, in How to Make Meetings Work: The Interaction Method, call this the "group memory."

- **Recording or summarizing** what was said so we can develop our meeting report and have a record for posterity.
- **Theming** what's emerging in the conversation so we can identify key issues and converge around priorities and pathways forward.
- **Shaping** the group's thinking by writing out what's emerging in the conversation and testing with folks.
- **Summarizing** decisions about analyses, priorities, next steps, and more.

Reframe Tensions

As the group starts to talk about their work together, watch for key tensions that tend to show up at this point. You'll likely see (if you're watching for them) two dynamics:

1. **Participants start to get polarized around one of these tensions.** Example: Someone will start pushing to just do some quick win and someone else "corrects" them by saying that we need to get clear about the overall strategy first.
2. **The group starts to focus on one dimension to the neglect of the other one.** Example: Everyone might glom onto doing a white paper rather than designing an actual pilot. That may be just fine but it's good to confirm with the group the reasons they are choosing to do one over the other and to make sure they are stretching "just enough" in advancing the thinking and work.

In any initiative team, you'll see a number of common tensions show up. Remember that the goal is to do BOTH things well in the tension, though the group might focus on one pole or another at any given time.

Common Tensions:

- Short-term & Long-term (this is a big one for program teams and initiative leadership teams). Closely related to…
- Early wins & Deeper innovation
- Diverging & Converging
- Learning & Creating solutions
- Feasibility & Impact (of initiatives and work of the Network)
- When we lead and when they lead
- Individual company initiatives & Moving together
- A few people diving deep/shaping up & Getting perspective and insight from everyone

The simplest way to help them not get wrapped around the axle, going around and around in a circle in these tensions is to simply name the tension. "This is what I see happening here, and I think we want both A & B. Is that right?" If they agree, then ask, "How can we get both A & B?"

Another way to transform these tensions is to continually reframe "but" into "and." For example, someone in the group might say A is important and another says, "But we need to pay attention to B." You might say, "Yes, clearly both are important—we need to pay attention to BOTH A AND B."

A common tension in social initiatives is Personal Responsibility & Social Support. For example, when someone talks about supporting entrepreneurs of color, others will hear that we're not asking those entrepreneurs to take personal responsibility. Clearly, fostering BOTH values will lead to greater success over time.

Test for Segments

Sometimes groups will be talking about a population (e.g. business owners, people experiencing homelessness, or factory managers) and tend to talk about the entire population as a homogenous group. This can lead to both analysis and solutions that ultimately won't work. If you see this happening, test with the group whether it would be helpful to start to identify the various subgroups that may experience the problem (or the potential solution) in very different ways. Examples include:

1. Treating all people who are homeless as though they all have mental health issues or are involuntarily homeless.
2. Treating all taxpayers as though they are likely to try to cheat on their taxes, when only a tiny fraction actually does.
3. Treating all suppliers as though they have no interest in work well-being, when there is actually a range of interests and values at play.

Gain Deeper Understanding

When participants make statements or ask questions, there is often a deeper concern, interest, or intent behind them.

As a leader and facilitator, you want to get to the deeper insight or meaning and not just accept statements or questions at face value unless, of course, the participant was really clear about her intent.

- "You're using the term 'equity.' When you use that term, what do you mean by it?"
- "So you're proposing that we confront the school board about this. If we actually did that, what do you believe the benefit might be?"
- "You suggested doing that study and it sounds like it's important to you. What your main interest in doing it?"
- "So if we engaged factory workers in the pilot, that would help ensure reduce the risk that they'll oppose the initiative later. It seems like any solution we come up with should accomplish engage factory workers if it's really going to work, is that right? If so, let's make that one of our design criteria.
- "You asked X. What made you ask that?"

TIP: Many questions that people ask in meetings are really statements in disguise but they prefer to ask questions because that feels safer. Asking people what's behind their question can garner more clarity about potential concerns or fears.

Check Back to the Data & Intent

At times, Networks and Initiative Groups get away from the original data, analysis, and intent that launched their work in the first place. This means that you may have to:

1. Re-confirm the original intent, which means the Goal, Scope, and Focus & Frame for the Network and the Critical Shift for the Initiative Group.
2. Re-confirm the assumptions, hypotheses, and analysis that lead the intent (as in, "Let's review what led us to prioritize that Critical Shift.").

3. Re-confirm the data we were working with in our analysis, such as our interview insights and quantitative data, including any new data that's emerged since the group started its work.

Frame up and Summarize

1. Focus on continually framing up what you're hearing from the group, making proposals about what that might imply for the work, and then shaping what you're hearing.
2. Our role should be less talking at (or even with) and more engaging, shaping, testing, and refining. So repeat back a succinct summary of the thinking at this point BEFORE asking what others think, so that their thinking is focused on something, not opening up even more topics and issues.
3. Summarize, and then ask for reactions to it, firming up the thinking even more, and only then allow the conversation to move forward.
4. Be sure to call on everyone, especially those who aren't speaking. Never leave the question of who will speak and not speak wholly up to the group.

Avoid: "What do people think about that?"

Instead do: "So Jen suggests that the core issue is the team's obsession with chocolate. What do others think about that?"

Present Decision Points

1. **Bracket the Range of Options.** Bracketing involves identifying the ends of a spectrum of options and then talking about other options along that spectrum (rather than a spectrum, it might be 3-5 levels). It can be helpful in building agreement because usually the group doesn't like either of the "extreme" options, so they'll agree on something in the middle. For real…try it.
2. **Present 2-3 Options.** Take the time to make sure that each option is clear and distinct before asking people to compare or discuss them.
3. **Short-term and Long-term options.** Options don't have to be mutually exclusive. You might suggest two options that would work on parallel paths—one longer-term and one shorter-term.
4. **Presenting a Straw Man.** Sometimes, you'll see one option emerging that might work for the group. You can frame that single option up and ask what people think about it.

Configuring the Group for Various Tasks

Determine the right group configuration for the task. Some tasks are best to do with the whole group while others are best at the individual level or small groups. As one example, if you've ever tried editing a mission statement in a group of 50 people, you've probably experienced how unproductive and unenergetic that was. But seeking rapid input on a draft statement from 50 people is highly energetic. Here are our opinions on which activities are best done at various levels:

1. **Individual Level.** This is the best level when you want people to think and reflect, generate an initial set of ideas or feedback, shape up their concerns or potential blockers to advancing the work, or get clear on something before sharing it with the group. This is also the ideal level to start many thinking and reflection activities because it allows introverts time to process their thoughts before opening things up verbally. Writing and developing frameworks or first drafts are often best done by individuals as well.

2. **Dyads/Pairs.** Dyads or pairs are excellent to provide participants with a safe forum to shaping up their thinking, concerns, or aspirations. Pairs are usually more predictable and safer than groups of three because the triad introduces a more complex group dynamic with greater potential for polarization, so use pairs when you want to create a simple, safe space for people to share sensitive or private information before sharing it with a larger group.
3. **Triads.** Triads are generally best for editing and pulling together feedback to incorporate into a work product. Having a third person helps protect the group against groupthink and provides both diversity and focus at the same time.
4. **Tables/Teams.** Groups of 4-10 are great for generating ideas and concepts, prototyping solutions, and reviewing work products and giving feedback. Just be sure to have the group appoint a facilitator and reporter before they begin working so they don't suffer from "Flatism." Teams are also the place to ensure that initiative groups are aligning around their shifts, priorities, and plans, and connect to one another in trusting relationships. One good process when you have time is to have multiple teams build a concept or prototype around the same shift and then come back together, present to one another, and build from the best concept using ideas from the others.
5. **Whole Group.** The whole group or network should be the place where you get people to aligning around shared intent, goals, and scope. It's also the place where most network learning occurs (though pre-learning and boiling down is often best done in Triads or Teams). This is also the level at which to do good connecting work (e.g. meaningful introductions, check-ins, and check-outs) and collective evaluations of the work.

Intervening Effectively

	Don't	Do
Make Clear Statements	DON'T use weak general statements ("It may be that we have something like X.")	DO use clear and assertive "I" statements (e.g. "I think X. Does that fit with people's understanding of the situation?")
Minimize Your Talking Time	DON'T take too much air time or assert your own views or opinions too much. You should talk maybe 20-30% of the time (or less) but make each intervention or statement strategic based on what the group needs.	DO listen, summarize, feed back and test—or test ideas and propositions that you think might fit the need in the moment.
Encourage Everyone to Contribute	DON'T allow silent participants, where some people talk too much and others rarely speak.	DO call on people. Name names—especially in virtual meetings. Go around and have each person respond to the proposition or question.

Keep Things as Simple as Possible	DON'T complexify the work by making work products more complicated than they need to be.	DO let the complexity emerge from the group as it needs to and play the role of editor when it becomes too much (e.g. you can call out 3-5 key points or elements and put the rest in the list below that).
Put Participants First	DON'T offer a prompt or question to the group and then be the first to respond to it (including check-ins).	DO offer a question/prompt, pause for a bit, and then ask someone by name to respond. DO always go last and then transition to the next agenda item.
Draw everyone into the discussion	DON'T get hooked into a one-on-one dialog with a single group member. This takes the emphasis away from the group (and it's sometimes a way to gain power).	DO respond to the person directly and succinctly (if needed) and/or redirect the issue or question to the whole group.
Focus on Who's There	DON'T focus on who's not on the call or in the room	DO focus on who IS present, that it's a great group (small groups are great for quickly moving thinking and analysis forward), and that we'll need to connect with the others to make sure they're engaged.
Make THIS the Work to be Done	DON'T talk or act as if the work of the group is something that people are doing <u>on top of</u> their regular jobs.	DO highlight the ways in which the group's work is an important part of the participants' jobs.
Make Yourself a Team Member	DON'T use "you" or "this group" when talking about the work of the group.	DO use "we" when talking about the work of the group. Make it clear through your language that you are "both feet in" with them on the work.

EXERCISE: Helpful and Unhelpful Interventions

CoCreative™

Building and Maintaining Momentum

This part of the work is about fostering a sense of optimism and abundance, building faith in the group's efficacy, and emphasizing the importance and meaningfulness of the group's work. As a leader, you are organizing the work to be productive, inspiring, meaningful, and satisfying (PIMS) not just expecting them to do it because they're in the network or team.

People's confidence can easily flag in this work because it's hard to make tangible and meaningful progress quickly across their various boundaries, especially when working virtually. They need to make real progress on meaningful work AND be aware that this is what they're doing! To this end it is important to provide ongoing encouragement, highlight progress and bring good energy to the group.

8 Habits that Support Momentum

1. **Be intentional how you frame updates and progress with the group**. Your language helps shape reality. Updates should build momentum, foster appreciation of the progress they have made, and imply what they might logically do next.
2. **Be intentional about what you focus on because they will focus on that too**. If you focus on who hasn't shown up for the meeting, the group will focus on that rather those who IS in the meeting (and, for example, how nice it is to have a smaller group in the meeting so we can move faster). Always focus on strengths, not weaknesses, of the group UNLESS you believe there is a weakness that needs to be addressed head on.
3. **Be intentional about how you ask people to report on their tasks and how you support them in between meetings.** These updates should be spicy and brief. Don't focus on what hasn't been done, but on HOW and WHEN it will get done.
4. **Focus on continually framing up what you're hearing from the group**, making proposals about what that might imply for the work, and then shaping what you're hearing. Our role should be less talking at (or even with) and more engaging, shaping, testing, and refining. So repeat back a summary of the thinking at this point BEFORE asking what others think, so that their thinking is focused on something, not opening up even more topics and issues. Summarize, and then ask for reactions to it, firming up the thinking even more, and only then allow the conversation to move forward.
5. **When you frame up the thinking of the group, work with the "best of" what they've been discussing.** Don't "pull back" and focus on the lowest common denominator in the discussion, but frame things up at the front edge of the group's thinking in order to move their thinking to the next level. Just remember that your frame up needs to draw from their analysis and discussion, not your own interests or agenda.
6. **Test for resolve.** It's important to know whether the group strongly believes in an analysis or idea, or whether it just happens to be the only idea that's evolved so they keep chewing on it because it's all they have! To test their commitment to the analysis or idea, offer an alternative to see if they really believe that the path they've chosen is the one they should pursue. Doing this can actually build resolve and make them more committed to the path that they're on.
7. **Do one thing at a time and keep a running list of "open" items.** This relates to the previous point. Don't let the conversation meander across an increasing number of topics. That's not productive and it doesn't feel good. If you're on one topic and someone

brings up another, you can note the new topic and say, “Great, I’ve put [that topic] on our list, but I want to make sure we get to clarity on [our current topic] before we move on.”

8. **Differentiate before you integrate**. Don’t focus on trying to integrate ideas or perspectives until everyone understands each idea or perspective is first. Only when everyone really understands A, B, C and D should you let the conversation move which letter is better or how the letters might fit together. Network participants often experience “merger mania” and want to start consolidating initiatives right away, often without really thinking through how this might increase complexity and result in losing something uniquely valuable in one or both initiatives. Hold them off until each Initiative Group has had a chance to really develop its thinking about what it’s creating and why.

13 Tools to Foster Momentum

Here’s a baker’s dozen of simple methods that help keep groups moving fast and focused on meaningful work, not unproductive dialog and debate.

1. Put How before If

Sometimes, making a commitment to solving a complex problem is intimidating or even threatening to members of a group. Often, however, what really scares people is the unknown (after all, most of us prefer the devil we know to the devil we don’t). To overcome these fears of commitment, we invite groups into thought experiments in which we explore possible solutions without asking for any commitments at all. Rather than first dealing with the question of IF we should do something, we first thoroughly explore–through storyboarding, roadmaps, backcasting and other techniques–HOW we would do it. Often, by the time we’ve completed our thought experiment around the question of how we might do something, many people in the room are ready to move forward on it.

2. Sketching

Consider an artist starting a landscape painting. Does she begin the painting by filling out some detailed part of a scene? Unlikely. Instead, she’ll use a light color to lay out the overall scene, and once that looks satisfactory, she’ll then start to add layers with finer and finer detail. When working with others, we sometimes get bogged down in the details of an analysis or possible solution before everyone even understands the basic concept of what we’re discussing. To avoid this, we talk about “sketching” the idea, “not filling in the details yet, but “getting the concept down.” We’ll have someone create a diagram of the idea on a flipchart or maybe have a team present the general concept in a 2-minute pitch to the rest of the network. Once we have agreement that an idea is even worth taking forward, we’ll then start to fill in more detail.

A terrific way to sketch is to have participants silently generate post-its, then put them up on a shared sheet or wall, clustering as they go, and then organize their thinking together.

3. Yes, And

People often assume that the best way to improve an idea is to critique it and point out its problems (“Yeah, that’s a good idea BUT…” or “No, we can’t do that because…”). The theory seems to be that if we can fix the problems with the idea, then it might work, or that any idea with problems isn’t worth developing anyway. Unfortunately, ideas are fragile things and they die easily. The surest way to get to better ideas is through improv—by taking a promising concept and building on it by having people add to it, evolving and refining it until they’re excited by it. The idea that results may be quite different than the one we started with (as is often the case in improv).

4. Satisfying Pieces of Work (aka "Good Enough?")

In working groups, the perfect is often the enemy of the good. Groups have a strange tendency at times to work an analysis or idea to death, sometimes even beyond the point where they've reached vehement agreement about the idea. While it's important for a group to achieve its general objective, but when the conversation and work keeps going after that point, the group's energy decreases rather than increases. Find the point where a satisfying piece of work has been completed by the group and bring that part of the process to a conclusion by acknowledging the good work that's been done and identifying next steps. Concluding (and celebrating) that piece of work and moving on will make the group's energy available for whatever's coming next.

5. Propositions

Leaders and facilitators of multistakeholder work are often hesitant to make proposals to the network. This is understandable—after all, the participants will ideally come up with its own analysis and ideas through their work together. However, bridging from data to analysis to shifts to ideas can be tough for groups. Here's one way to grease the skids of innovation: Rather than waiting for the group to come up with an analysis or create a great strategy, try testing out a possibility by making a "proposition" to the group. For example, if the group has several ideas and is having a hard time choosing one, just propose working on one for now. That proposal creates a reference point for the group. They may decide to reject your idea but at least they've moved forward their thinking together, and the reasons they didn't like that proposal can further clarify their thinking about what proposal will work.

6. Questions Over Answers

Developed by our friend Patricia DiVecchio, the *Asking the Next Right Question* technique keeps groups moving fast by focusing on finding the right questions before we struggle with finding answers. When a small team presents a possible solution to a large group, we ask the larger group to ask questions but the team is only allowed to capture the questions, not answer them (clarifying questions excepted). Invariably, the team finds that 2-3 of the questions provide fresh insight that helps them refine their solution on their own, which builds ownership.

This technique avoids a host of problems with the conventional Q&A approach: (1) the desire of the team members to look smart and competent so they make up their answers on the spot, (2) the sense of having answered and resolved a question so the team doesn't consider it further, and (3) the larger group taking away "responsibility" from the team for struggling with the hard questions themselves.

7. Versioning

Sometimes, decisions can seem like all-or-nothing propositions, which increases participants' sense of risk ("If I don't get my way now, it's all over!"). Putting versions on analysis and even the goal of the network can remind people that everything is subject to change by the group, which keeps everyone open to learning and adapting the work as they move forward. This in turn lowers the stakes, since everyone knows that they can change the work at some point in the future if the current assumptions and approach aren't working.

8. "How Might We…" Questions

A common question in design thinking is "How might we…" and the question is particularly useful at moving people from either-or mode into creative action mode. For example, when someone points out that we can't get a poverty alleviation solution through customs in a given country because of corruption, we can turn that barrier into a problem-solving question by asking "How might we get this into the country reliably?"

9. Prototyping to Generate Design Principles

When people start listing the reasons a prototype won't work, consider it a gift. We can turn those critiques (and the reason people like the idea) into a working set of design principles that can inform the design of even better prototypes. Then once we have an idea that meets the shared principles that we've developed together, we'll be that much more aligned behind the idea. That's also why we prototype early and often in Collaborative Innovation—it's to learn what will work, what we like, what we don't like, and why—so that we can get to a solution we can all support that much faster!

10. Fast Feedback

Feedback on prototypes and concepts can become an agonizing process if it's not focused and contained. We follow a process of: (1) A spicy and brief presentation, (2) other members of the team adding any missed points, (3) clarifying questions from the rest of the network. We then ask people giving feedback to write one item per post-its (using Sharpies on 3x3" Post-its) and responding to three questions:

One thing you LIKE about the concept or prototype.

One thing you might ADD or CHANGE.

One think that the group might want to TEST or LEARN next.

11. Minimum Valuable Products

Agile software developers, who use a "design-as-you-go" approach to software development, employ a concept called the Minimum Viable Product. This is the simplest version of an app or program that delivered real value to the user.

In Collaborative Innovation, we use the concept we call Minimum *Valuable* Product to refer to a work product that has real value even if it's not the final solution that the group intends to produce. As Initiative Groups produce work products that are designed to get you toward your ultimate goal, help them consider how their interim work products can also have real value right away. Be aware that Initiative Groups can work on more than one product; they don't have to be bound to just one. They can work on two or more solutions in parallel or in series.

12. Design Reviews

As you refine the concept and move from prototype to pilot, conduct 30%, 60%, 90% done design reviews to keep Initiative Groups focused on their next milestone rather than the final perfected product.

13. Treat Everything as a Hypothesis

Groups can get stuck trying to get things just right, like agreeing on very specific goals and initiatives. While it's important to have an overall shared direction and agenda, it's not helpful to get stuck in analysis paralysis. We use terms like "hypotheses," "working goals," and "good enough" to remind groups that we only need enough clarity to keep moving forward effectively, and that we will refine our goals and our analysis over time.

TIP: Whatever the group is doing, keep checking to ensure that they are planning work that will have impact and work at scale! Sometimes, the work product can become the work so always ensure that the group is clear about how their work products are advancing their larger strategy.

…But Sometimes Disruption is Needed

While you want to build engagement and momentum, and set a good pace for the work, it's important to work with your Design Team to assess whether some disruption of the flow of work might be needed. Why in the world would you do this, you ask?

Sometimes, the initiatives that have emerged in a Network aren't powerful enough individually or as a set to actually achieve the Network's goal, or at least do so with the speed and scale of impact we need. That's a problem because we're going to end up wasting people's efforts, resources, and time.

Unfortunately, most people (possibility including your Design Team members) have a tendency to "go with the flow" and they may not want to disrupt the work to step back and reassess it. That means that you, as the ultimate "Catalytic Shepherd" for the work, may need to play the bad guy at some point and ask people to stop, step back, reassess, and maybe redo some of their thinking and work. Such is the burden of leadership.

TIP: Sometimes you, as the Collaborative Leader, must bring the difference that the group is lacking. For example, if a group likes to rush to action, you may need to get them to pause and ensure they've done enough reflection & analysis (even—or especially—if you also want to rush to action!).

REFLECTION: MOMENTUM IN MY MEETINGS

Instructions:

Think of a recent meeting where you would have liked to have more engagement and/or momentum.

1. From the previous list, pick one strategy for building momentum that stands out to you—maybe because it's interesting or seems particularly helpful:

2. Why does it seem valuable?

3. How might you apply it in an upcoming meeting?

Creating Helpful Narratives

How you talk about and frame the work has a huge impact on the group's sense of efficacy and their confidence in success. After all, it's likely that no one in an initiative group has done anything like this before—they rely on you for validation and support.

Scarcity and uncertainty narratives are often about you and your own anxieties, not about the group. If the group expresses frustration with the work, clearly you need to address that openly and honestly. But projecting your worries onto the group when you have no insight about how the group feels is like shooting yourself in the foot. Would you do that? Probably not.

Being conscious and intentional about how to talk to the group about its work is critical to helping to shape narratives that are helpful. We want to be real in our narrative but shift from using a narrative that comes from the lowest common denominator (of resource scarcity and transactional language) to using a narrative that conveys abundance, progress, and overcoming difficulties.

Common Examples

A. More Helpful	B. Less Helpful	Why
"If we can X, Y and Z, that will be powerful, wouldn't it? Let's figure that out."	"We'll need to figure out how to do X, Y and Z."	B is less inspirational and doesn't connect people to possibility.
"Yeah, we had some real setbacks, but we're getting traction now."	"It's been tough going so far."	A focuses people on forward momentum while B looks backward.
"Good. We have a great team here so let's get started."	"I'm not sure where so-and-so is today. We'll have to look into that."	A is about abundance; B is about deficiency.
"If this was easy, people would have done it already."	"I know this is really hard, but we'll just have to figure out what we can do."	A is bracing and exciting; B is dull and sounds like drudgery.
"This work is so important to the lives of real people who are being directly impacted."		A is about why this work is meaningful and needed. ☺ B is about nothing. ☹
"We have the opportunity here to lead transformational change. Let's decide what we want and then figure out how to resource it."	"We'll have to figure out what we can do with the resources we have."	A is about grit and determination (Luke Skywalker as a Jedi); B is wimpy and uninspiring (Luke Skywalker as a sand farmer).

“Okay, we’re doing X, right?”	“So, are we doing X?”	A prompts with clarity and determination; B leads to more discussion and uncertainty.
“So I’m hearing that it might be possible for us to create this new program that would do X, Y and Z and this would be way beyond anything that’s been done before. Is that right? How might we make this happen?”	“So what do folks think we should do?”	‘nuff said.
“If we’re only going to do what others could do, then we don’t need this level of collaboration.”	“I’m wondering if we can do more than that.”	A is challenging and galvanizing (and should be used carefully!); B couldn’t inspire a hungry dog to eat.

Narrative Types in Collaborative Innovation

Name	Use	Stories	Example
Trailblazing Work	When the goal seems impossible, under-resourced, or just plain difficult.	Putting a person on the moon. Sailing from Hawai'i to Tahiti with no instruments.	"This hasn't been done before and no one said it would be easy. Yes, the apparel industry did something along these lines, but our industry is far more complex. We have 15,000 chemicals being used, most of which haven't even been assessed for safety. And yet, we've set out on this path together because we believe it's important..."
Small Group, Powerful Change	When they need to be reminded of the abundance of capacity and resources they actually have.	Dolores Huerta, Cesar Chavez, migrant farmworkers and The Delano Grape Strike boosts. Komako Kimura, Emmeline Pankhurst, Millicent Fawcett, Susan B. Anthony, Elizabeth Cady Stanton, and the suffragists and suffragettes.	"Folks, we have the largest electronics companies in the world at this table—in fact, some of the largest companies in any industry. We have some of the most capable leaders from those companies (yes, you!). We have dozens if not hundreds of examples of successful reduction and substitution strategies, willing partners, and potentially millions of dollars at our disposal. If we can make this happen, who can?"
Human Need	When they need to be reminded of the urgency of the real suffering that will continue if they fail in this work.	Child labor in the industrial revolution. The Ethiopian/East Africa Famine, Bob Geldof, and Band Aid.	"Whatever our challenges are, we are not working on a factory line using a toxic solvent like N-Hexane to clean boards with no ventilation. The people out there who are experiencing that can't solve this problem. They don't have the power, knowledge, or resources. Maybe this isn't a famine or a natural disaster but it's a disaster nonetheless. They need us to act—not a year from now, but today."
Moment in Time	When they lack a sense of urgency.	French revolution. U.S. civil rights movement.	"We all came together because we believe that collaborating across or organizational boundaries is the only way to solve this problem. Companies have been working individually on this problem for years. NGOs have been campaigning and organizing around this issue for decades. But things have not significantly changed. This is our best shot at fixing this. We need to act now."
Scale is Needed	When they are thinking small-scale or incrementally.	The Green Revolution[4]. Million Man March.	"Of course, short-term plans and quick wins are important—critical, in fact. But this is a massive challenge involving millions of farmers around the world. We can't solve this one farm at a time, or by lining up a handful of pilots. What is the scale at which we need to work to really transform this system?"

[4] A global set of research and technology transfer initiatives, led by the Ford Foundation, the Rockefeller Foundation, and Norman Borlaug, that resulted in a doubling of global agricultural productivity.

EXERCISE: DEVELOPING A NARRATIVE

Instructions:

1. Break into pairs
2. Spend 5 minutes reflecting individually to develop some talking points for a narrative that will help build greater traction and momentum for your Network/Program team.
3. Spend 5 minutes taking turns sharing talking points with your small group. Give each other input on what you like about the talking points and how to strengthen the narrative.

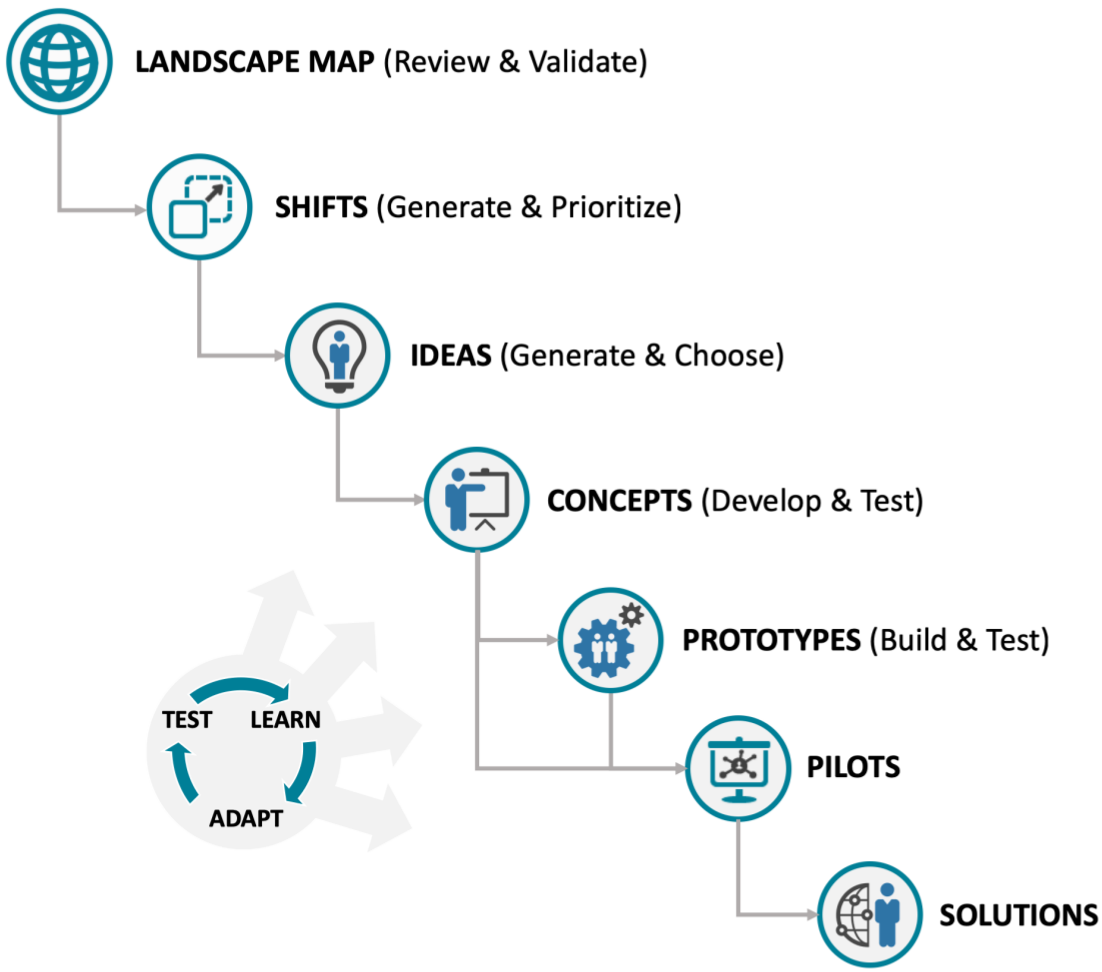
My Talking Points:

Name of Network or team: ___________________________________

Talking Points:

Moving from Insights to Solutions

While this course doesn't cover the full process of Collaborative Innovation, it's helpful to consider where your team or group might be in the following process. Are you working to understand the current strategic landscape around your problem, are you trying to select your top ideas for solutions, or have you identified possible solutions and you're piloting them in order to test and refine them?



Wherever you are in this process (assuming you're even using a Collaborative Innovation process), it's often helpful to consider what work products might be most helpful to the group in advancing or clarifying its thinking. The more you can help your group ground its thinking, analysis, and solution development in concrete ways, the more you'll avoid going around in unproductive and frustrating circles.

Creating Work Products

Making tangible things is often the most difficult but also the most useful activity for groups, especially when they are collaborating virtually. Making work products makes the learning focused and the outputs tangible and real. At the end of the day, if the group isn't making something that's deepening their learning and moving toward a real solution in the real world, they will be ineffective and lose interest.

Prototyping to Learn

We prototype early in our process so we can learn more about the problem and to learn more about what type of solution might be most effective. Early prototyping is less about trying to get to a final solution and more about testing hypotheses and isolating variables that we need to do more work or learning around. Prototyping early helps us answer questions like:

- ❑ What does our solution look like? Are we all thinking about the same thing as we discuss this idea?
- ❑ What are the most important parts of the ultimate solution that we need to understand better or learn more about?
- ❑ Is there a better, faster, cheaper way to make this shift happen that our current solution?

Even prototyping an idea that the group KNOWS won't work (but which represents their best thinking to date about the solution) is a productive and helpful exercise.

Helpful Work Product Options

An initiative group can develop a "solution set" that consists of multiple work products, for example, an initiative group producing both a white paper and list of top target chemicals. In fact, most solutions will require the development of multiple products. Here are some of the most common work products that groups might make to help them get to their final pilot:

1. **Prototype.** It's often more helpful for a group to identify a key work product that represents what they are trying to do than to keep discussing theoretical possibilities. Building a prototype, even with paper and markers, helps to groups focus and learn. *(While we don't cover prototyping in this course, we're happy to share our decks, methods, and materials on this.)*
2. **Roadmap.** Choose a goal or future state, put a date on it, and then have the group "backcast" the milestones and/or steps to get to that future state. This can help when the group is getting wrapped around the axle on a Short-term/Long-term dynamic.
3. **Solution Pathways.** As you listen to conversation or reflect generally about the work a group is doing, you might observe that the group is actually talking about several different ways of proceeding and that those ways are, if not mutually exclusive, at least very different. By naming and laying out these different solution pathways (the folks at Context Partners call them "Change Vectors"), you can help the group consider these discrete scenarios individually rather than as one muddled mess.
4. **Design Principles.** As the group talks about what will work and what won't work, they are talking about design principles. Turn that talk into a work product by capturing these statements and turning them into a working set of discrete and comprehensive Design Principles, or criteria that a successful solution might have to meet. Just be sure that the group treats that list as a working hypothesis that it will need to refine moving forward, rather than a list of "rules."
5. **Maturity Model (or Segments).** Sometimes, breaking out the group's analysis into a "maturity model" can be particularly helpful. If you start to see them talking about stages, levels, or segments of a population with different needs, focus their conversation on drafting a model. This is like 4 levels of factory performance on worker engagement and empowerment, or the fact that farmers aren't homogenous and it helps to think of 4-5 personas or archetypes of farmers instead.
6. **Spectrums.** Like levels and segments, but a spectrum is obviously where people fall along some dimension. You might observe that initiative group participants are falling

along a spectrum in a discussion (and that this spectrum might actually be a design tension) or you might find that factories or a certain stakeholder group fall along a spectrum, in which case you might test with the group whether that's more a levels situation than a simple spectrum.

7. **Definitions.** You'll sometimes notice (again, if you are looking) that people are using the same term but it's not clear that they are talking about the same thing. That's a fundamental problem that will inhibit the group's work unless you "calibrate" their definitions. Simply say, "I'm thinking that people have different working definitions of what X means. I'd like to hear from each of you what that term means to you." (Then be sure to stay focused on hearing from everyone and don't let the group turn that go-around into another conversation until you've really heard from everyone.)
8. **Focus & Frame.** We've talked about this before but focus and frame is really about scope and whether everyone is drawing the boundaries around the work in the same place. If, for example, some initiative group members believe that worker rights are definitely within scope for the CEP work and others assume it's not, then that's a critical issue to bring up to the group and to creating an operating agreement around. In that example, it turned out that certain worker rights were in focus whereas others were in frame and the group agreed not to focus on those.
9. **X Feet.** If you find that the group is going around and around and confusing itself more and more, then they might be experiencing a "Missing Middle." That is, they have a big goal and next steps, but they lack a framework to connect these two levels. Create a "levels" map with their overarching goal at 30,000 feet, their short-term plans at 10,000 feet and THEN ask them to rough out their long-term blueprint for change at 20,000 feet.
10. **What if propositions.** Sometimes, you can help a group by testing a possible course of action and having them react to it. In their reactions, you'll hear more design principles and more points of clarification about what they believe will or won't be effective. Just be sure that the proposition or idea you test with them isn't just your own favored idea, but that it emerges naturally from their analysis, goal and discussion.
11. **Hypotheses.** Identifying and clarifying the working hypotheses and assumptions of the group related to its Critical Shift, Concept, or solution can be very helpful. We sometimes create a hypotheses document to lay these out and decide what to learn or test next from the list to advance our work most effectively.

The Minimum Valuable Product

Agile software developers, who use a "design-as-you-go" approach to software development, employ a concept called the Minimum Viable Product. This is the simplest version of an app or program that delivered real value to the user. For example, when Gmail was first released, it was a very simple application, but the way it kept related emails together was very useful for many users. By keeping it simple and focused on this key piece of functionality, Google avoided overbuilding it.

In Collaborative Innovation, we use the concept we call Minimum Valuable Product to refer to a work product that has real value even if it's not the final solution that the group intends to produce. Here are a few examples:

1. One network created an inventory of all the programs through which companies could reward farmers for environmentally-friendly growing practices. While they created this product only to learn how to design a better one, many companies have found the product useful in considering how to design their own programs.
2. When we pitch to foundations to support the startup of a new innovation network, we often explain that even though we might conduct all the interviews and develop the insights, the network might not come together, we will still be able to produce a rich analysis and report on what we learned. Even though the network was our intended (or hoped for) product, the report still has value.
3. Another network produced profiles of the most hazardous chemicals used in electronics factories. Although their ultimate intent is to replace or eliminate those chemicals, the profiles themselves provide very useful to make the case to companies to support eliminating them.

So, as you produce work products that are designed simply to get you toward your ultimate goal, keep in mind that those interim work products can also have real and lasting value.

Take note!

As you refine the concept and move from prototype to pilot, do 30%, 60%, 90% done design reviews, to keep refining the plans and thinking.

Be aware that Initiative Groups can work on more than one solution; they don't have to be bound to just one. They can work on two or more solutions in parallel or in series.

Whatever the group is doing, keep checking to ensure that they are planning work that will have impact and work at scale!

TIP: Sometimes, the work product can *become* the work so always ensure that the group is clearly setting their work into the larger plan and strategy!

Evaluating Possible Solutions

Impact-Difficulty Matrix

Another simple framework is to create a grid with "Impact" along the horizontal axis and "Difficulty" along the vertical. Then have the group first rank their top 10 ideas along the "Impact" axis (with no two ideas occupying the same slot along that axis), and then moving them up to their estimated level of difficulty. This exercise will help identify which ideas/solutions are the low-hanging fruit where work can begin, as well as those big, high-impact ideas that might be difficult to move forward right now.

Desirable-Viable-Feasible

A common framework for assessing possible solutions (and identifying ways to improve them) is to ask:

- **Is it Desirable?** How does it meet their real needs? How can we make people want it?
- **Is it Financially Viable?** That is, will we actually have a way to fund the solution initially and operationally?
- **Is it Technically Feasible?** That is, can it be done with existing technology?

We also add another question to this traditional list: Is it Meaningful? That is, is it going to result in real substantial change toward our goal?

EXERCISE: IDENTIFY A WORK PRODUCT

Instructions:

1. Find a partner to work in a pair with.
2. Identify a type of work product that would be helpful to create in the context of the discussion your small group had earlier today. Choose a work product that would help the group refine its thinking around an idea to get themselves closer to a pilot.

3. Quickly prototype that work product. You can just sketch it here if you want:

The Meeting Cycle: Close

Near the end of the meeting, you should be helping the group converge toward a satisfying close to the work they've done together. That doesn't mean that all the decisions have been made, or that the larger work has been completed. It simply means recognizing (and celebrating) the progress that the group has achieved in that session.

As a leader and facilitator, this often means that you need to take time during breaks (and even during meals) to pull up on what's emerged in the group so you can present back the group's decisions, work products, and next steps. Here's a script you might use for this:

1. **"We've made several decisions together in this meeting**. I've listed those on this flipchart page. Did I capture everything? Anything you might change in some way? Does this capture our decisions from today?"
2. **"Here's what we've done in terms of work together.** We did the next version of our [work product] and made the following changes (listed on a flipchart page or whiteboard). Anything to change or add to this? Okay, let's give ourselves a hand!"
3. **"Now, I've listed our next steps here, including items for our next meeting and individual assignments.** Anything missing? Anything we might need to change here? Is anyone concerned about your capacity to accomplish what's been assigned to you? [Address this as needed.] Okay, let's make sure we've got dates when we need these things done [again, you have hopefully proposed dates on the flipchart page already so the group has something to respond to]."

At times, however, a meeting has achieved its intent and the group can be left with a lack of closure and a feeling of dissatisfaction. This is okay, but it's helpful to help the group accept this and orient toward a plan for getting closure on the open task or issue. In these situations, it's best to end the meeting with an assessment of status and a plan for moving ahead:

1. "Okay. We've made some good progress on understanding this issue.
2. Here are some key things we've learned and/or agree on...
3. However, we clearly haven't made a decision/determine a pathway/defined the problem yet and that's okay.
4. What we'll do next is… (this might include a small group doing work to frame up the issue more clearly before the next meeting, or it might just be that we'll all reflect on what we've discussed here and come back ready to make a decision).
5. And we'll meet on XX at XX to hopefully bring this to a conclusion and decide how to move forward.

Evaluate meeting

Plus-Delta Meeting Evaluations

Use this method to evaluate and debrief team meetings, or how the team is working together over a period of time. This technique is used by many organizations around the world and is often referred to as a "hotwash" or an "after-action review."

Plus items are things that are working well and that the team should keep or build on. Example: "Speaking one at a time."

Delta items are things that the team might want to do differently. Example: "This space is really distracting; let's find another meeting space next time." The focus is on doing something differently, not just stating a problem.

How to conduct a Plus-Delta evaluation:

1. On flipchart paper or a whiteboard, draw a large "T" to make two columns and label the columns "What worked?" and "What could we do differently?" Or just use the symbols for plus and delta.
2. Ask the team to identify what worked in the meeting (the plusses), then the things to do differently (the deltas).
3. Ask the team to be specific with each item. Statements like, "Great meeting!" simply aren't useful, so ask something like, "What specifically made it great for you?"
4. To the extent possible, try to decide how to resolve the delta items (e.g. "Is there a better space for our next meeting?") or delegate them to someone, such as the facilitator of the next meeting.

Doing the plus-delta exercise is a great investment in your team. It only takes five minutes per meeting, and it will help your team work more efficiently and effectively in future meetings.

Check Out

Just as collaborative leaders open meetings with intention, you should also close meetings with clarity and commitment about agreements and next steps, and support the group to reflect on – and appreciate – their collective work. There is an element of ceremony to intentional meeting closures that invite people to reflect on and appreciate the work they did together. This kind of closure builds momentum, contributes to a group's positive narrative about itself, and can help galvanize people's commitment to the group's goal. Here are some options to close a meeting with intention:

1. **Personal Reflection.** Invite people to take a moment, in silence, to think about the answer to a prompt question. Then ask for **a few people to share, popcorn style.**
   - What will achieving this goal require of me personally?
   - What's your biggest hope for how this group can make a difference?
2. **Group Go-Around.** Going around the circle, ask people to respond to a prompt like the following:
   - Reflections on our work together over the past x day(s)
   - One appreciation for this group
   - One word about how you're feeling right now
   - Where are you now, in three words or less?
3. **Group Sharing.** Ask the group a question and invite **all members to respond popcorn style.**
   - What's most jazzed you about today?
   - Reflections on the day: How did it go, key learning, big surprises, etc.
   - What worked for you about the last two days?
   - What stands out for you about our work together?

For multi-day meetings, there is also a time at the close of Day 1, where it is important to remind people of the ground we covered and queue up the work ahead. We send people off (e.g. during dinner) with:

- What we've done, where we are now, what we'll do tomorrow (a tour guide approach)
- We'll start promptly at [time] tomorrow morning and we'll focus first on X.

The Meeting Cycle: Follow Up

After any meeting, leaders have a critical role of pulling up on the work that was done and shaping it for maximum clarity and momentum.

Meeting Reports

A good meeting report that summarizes the analysis, decisions, and next steps for the group is very useful, but only if it's actually read by your Network participants! We send a BRIEF report out within two weeks of a Network meeting and within 2 days of an Initiative Group meeting. We also summarize key commitments and next steps in the body of the email message even if these are contained in the report.

For Network meetings, we also produce a formal meeting report, which is useful for drawing on later for funding proposals, briefing new participants, and/or for potential legal issues in the case of industry networks.

TIP: Note the big difference between notes that simply *record* the output from the last meeting and a meaningful meeting summary that *pulls* up the best thinking and outcomes from the meeting. These can be very different. Take the time to shape the material from the meeting so that it's as *useful* and as *directional* as possible for the next meeting. After all, who really wants to read the verbatim record of a meeting? What we want is to see our best thinking and intentions represented in the summary output from the meeting so we can build on that good thinking at the next meeting.

Meeting Evaluations

We rarely do formal, written meeting evaluations in a meeting since it's a fairly low-energy way to end a good meeting. Instead, we follow up after the meeting with a very brief survey, often consists of only a few questions: (1) what went well in the meeting, (2) what you wish had gone differently, and (3) any other feedback on the results of the meeting.

Roadmaps

Instead of complex project plans with lots of details, we produce very visual roadmaps of the upcoming key meetings, tasks, and milestones to let everyone know at a high level what's happening next.

How to Backcast a Roadmap of Work

Sitting at a computer to plan out a roadmap for your initiative is boring. Crowdsourcing a roadmap with everyone in the room in 15 minutes is fun AND it builds ownership of the work. Why choose a boring and isolated approach over one that's fun and interactive?

Backcasting begins with today (whenever today is) and ends with a key milestone at a future date, such as a pilot project that we want to complete within 6 months.

The template for backcasting is a blank wall or long sheet of paper with Post-its for key dates. For example, if we have until December 1 to get a pilot project done, we might put the following Post-its along the top of the work area:

TODAY	3/1	4/1	5/1	7/1	9/1	11/1	12/1

Notice that we leave more room in the early part of the timeline. That's because groups always identify more tasks for the near-term than for the long-term.

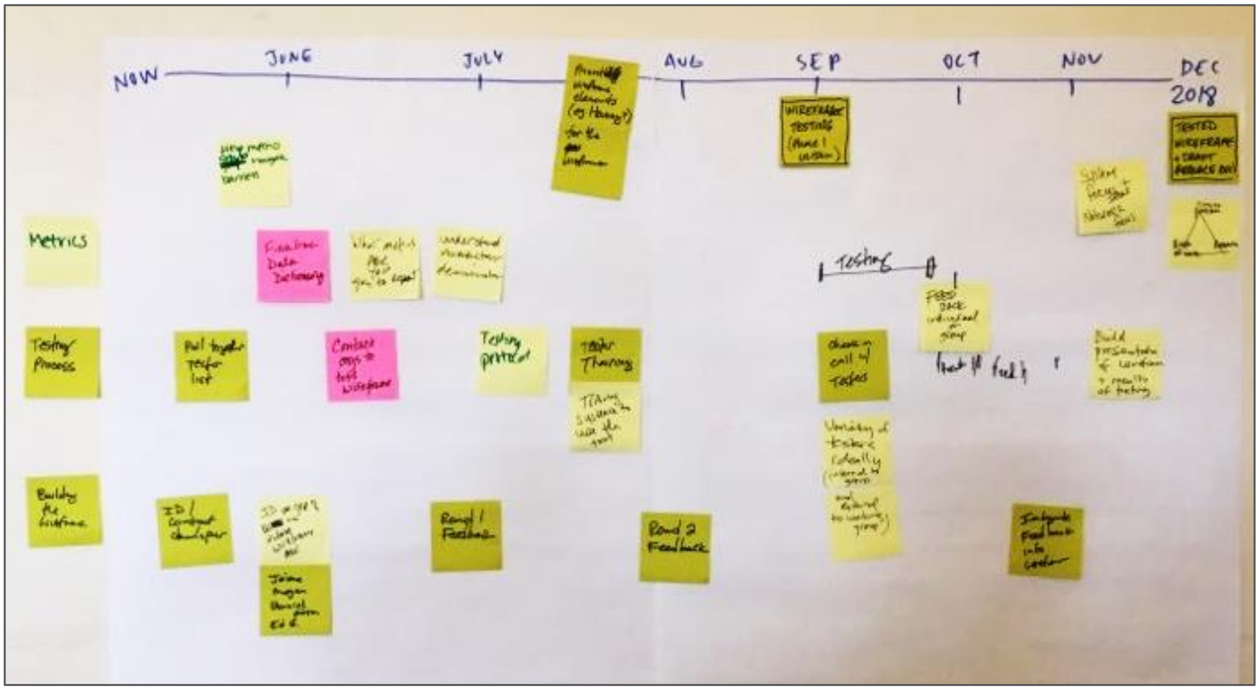
Once you have the template on the wall, here are the types of instructions you might give to the group:

1. "This timeline runs from now until December of this year. We're going to crowdsource a roadmap (or workplan) for our initiative together on this timeline.
2. "Let's first agree on what we would like to be able to deliver by the next network meeting in December. Put that objective under the 12/1 post-it.
3. "Now let's work silently for a few minutes. Each of you generate any tasks or milestones that need to be done between now and December and put them on the timeline where you think they belong. As you add your items, see how they fit with what others have put up there.
4. "Great! Now let's organize things. First, what are our key milestones between now and December? Okay, now, are there natural streams of work here, like pilot participant engagement or materials development? Now let's order and add tasks logically—for example, in order to send out this survey out, we'll need to draft the survey.

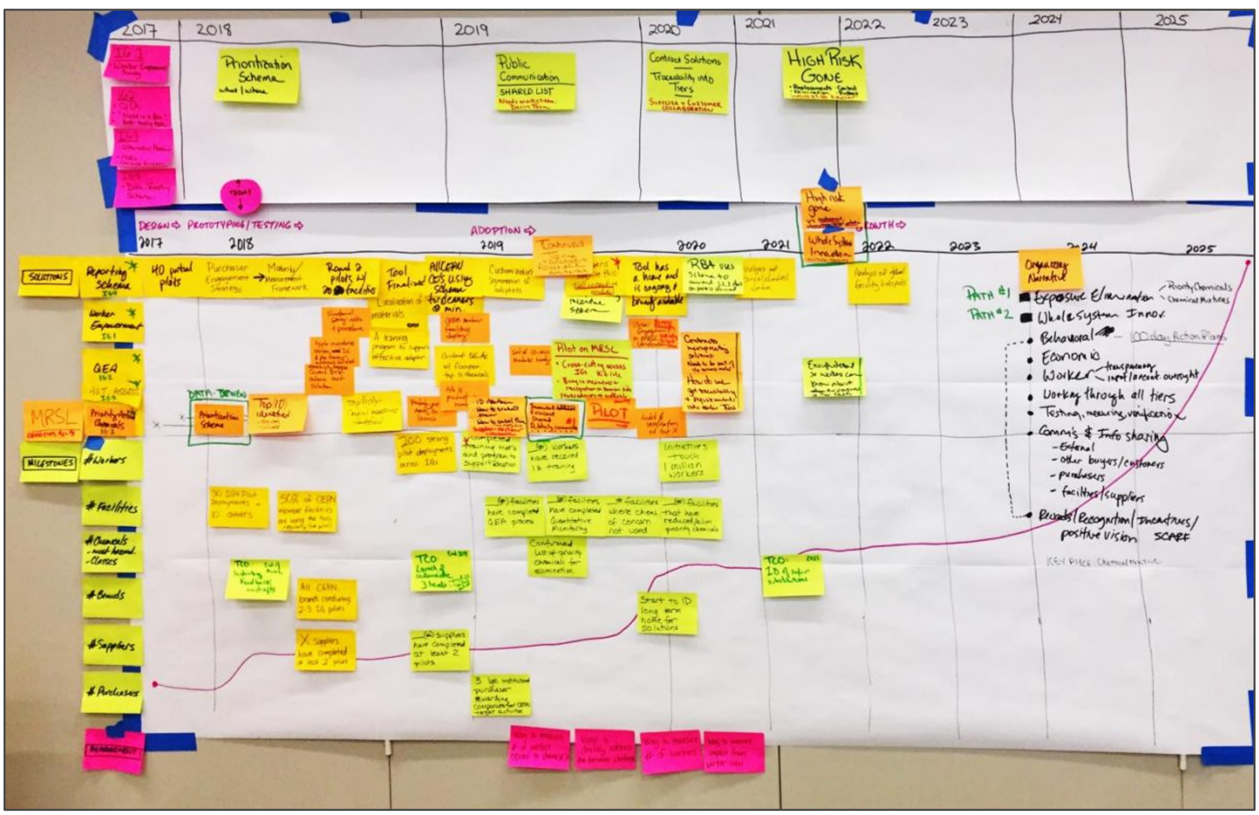
Here are common backcasting prompts we use to help people think of what types of tasks to add (the prompts will vary by the type of project). We sometimes write these on a list or print them on cards for participants to use as prompts.

- Engaging Users
- Communications
- Stakeholder Engagement
- Materials Development
- Pre-testing
- Engaging Partners
- Survey Development/Testing
- Providing Guidance to Users/Participants
- Testing
- Supporting Pilot Participants
- Engaging Workers/Parents/Other
- Resourcing/Funding
- Language Translation
- Gathering Feedback
- Measuring Impact
- Learning
- Mitigating/Managing Risk

A Simple, 6-month Backcasting Exercise



An 8-year Backcasting Exercise



Using the Round Robin Method

Collaboration on work products can be problematic and this is often because of the process we use to develop them. Consider these common approaches:

- We ask one person to develop a work product and then send it out to everyone else. That puts a lot of work on that one person AND we add the confusion question of how many people are supposed to comment on the document at the same time.
- We ask a small group to develop a work product but then that group has to find a time to meet and that's kind of annoying, and it sometimes doesn't happen in time.
- We ask people to send their feedback on a work product that we're going to send out and no one responds. This is related to the social-psychological phenomenon called the "Bystander Effect," where everyone expects someone else to do the work so no one ends up doing it.

Here's a terrific way to advance a work product and build engagement and accountability at the same time, based on the Japanese decision-making method called "ringgi".

1. Have one person sketch out a product (like a draft plan for the group's work over the next six months. This can be incomplete and a bit messy, but it's a good quick start.
2. That person sends this rough cut to the next person, who edits it, and sends it to the next person.
3. The next person edits and sends it on, until it reaches the person who started it, who does one more edit and then sends it out to the whole group.

The interesting part is the rules that govern this process:

- We identify the chain beforehand: Who will do the first rough version, who's next, etc.
- We don't use track changes in this process. Each person is free to add or edit as they see fit, building on what people before them did.
- If someone really disagrees with something that an earlier person did, she notes this at the end of the document in a final section called "Items to Discuss/Resolve."
- Each person holds on to the document less than 48 hours. If someone decides that he can't do his part, he just sends it on to the next person.

This process creates a chain of accountability for people to get the work done so the next person can do his or her work. Each person is responsible AND the whole group is too!

Deepening Your Collaborative Leadership Practice

1. **Practice doing two things at once**—being part of the conversation AND observing and reflecting on what's happening at the same time. This is like seeing the vase and the two faces at right at the same time. You can do it; it just takes practice.
2. **Work constantly in your facilitation to building Clarity, Confidence, and Definition.** We are clear about what we're doing and why, we have increasing confidence that we can pull this off, and the work and plans are well-defined.
3. **Test your meeting plans.** Always pre-test meeting plans with the Design Team or Initiative Group chairs to both build shared ownership of the work and to get feedback to improve the design.
4. **Always work from a clear intent.** When designing meetings, first define the purpose and desired outcomes of the meeting BEFORE you start designing the meeting itself.
5. **Be as "Clean" as possible in your interventions.** When intervening as a facilitator (like getting someone to stop talking because they are taking up a lot of airtime), do it in a way that's as simple and clear (and as friendly) as possible. It takes courage to be clear when you're basically asking someone to stop talking but keeping it simple and direct is better than creating more discomfort by sending unclear signals.
6. **Exercise humility AND confidence.** You can show up as a strong leader and as a humble facilitator in service of the network and participants. This is a very powerful polarity that attracts trust and confidence in you as a leader.
7. **Practice giving and receiving feedback.** Feedback is a pre-requisite to growth. Without information on how our behaviors impact others, we cannot develop new, more effective behaviors. Giving feedback to stakeholders in a network is equally important to help them understand their impacts and realize the need for change, whether that's showing up in a more collaborative way or talking about the work in a more productive and helpful way. *See Appendix C on page 86 for a helpful approach to giving feedback.*

CoCreative™

REFLECTIONS ON THE DAY

What have I learned that will help me most in my work?

What 1-2 key actions will I take in the next few weeks to integrate the learning from this course?

What process for ongoing learning and improvement around facilitative leadership do I want to set up?

Appendix A. Check-in Prompts

Substantial Check-in Prompts

1. What gift are you bringing to our work together today?
2. What's one thing you love about our/your community/planet?
3. Why did you choose to spend your work-life time the way you did/do?
4. Call me when.../Call me if...
5. Is the glass half full or half empty? What is your stance as you move through life?
6. Share a story of a time you took a risk based on your values.
7. What is the BEST compliment you have ever received? What did it mean to you?
8. Whom would you trust with your life? And, Why?
9. What is one value you live by that instructs your life and decisions?
10. One thing you are looking forward to this year.
11. Share a highlight of your weekend.
12. One thing you're proud of in your work.
13. One thing that you love about our planet.
14. Would you consider yourself more an introvert or extravert? What does that mean for how we work together?
15. What's your basic philosophy in a tweet?
16. What is the hardest thing you've ever had to do? Why?
17. When you were a kid, what did you want to be when you grew up?
18. What is one goal you'd like to accomplish during your lifetime?
19. What past action (big or small) did you take to improve the quality of your life?
20. What's one highlight of your past week?
21. What part of your daily routine do you enjoy most?
22. Who is someone you admire, and why?
23. What is one place where you've felt most peaceful?
24. What might you say your calling in life is?
25. What might you do in your life if you knew you could not fail?
26. What would you do if you did not have to work?
27. What's one item that has great meaning for you, and why?
28. What are two truths and one lie about you? Let the others guess which is which.
29. What book, movie or video have you seen/read recently you would recommend? Why?
30. What is the most bizarre encounter you have had in life (at work, personal, from travel, with friends)?
31. What was your most embarrassing moment?
32. If you had a time machine that would make only one round trip, what point in the future or in history would you visit? Why?
33. What is your favorite hobby?
34. What's your favorite outdoor activity?

35. What is one favorite thing to do by yourself?
36. What's one crazy activity you've considered trying?
37. What is your idea of fun?
38. What's one thing you consider yourself to be very good at?
39. What's one thing you consider yourself to be very bad at?
40. What is a hidden talent you have?
41. What was one new experience you tried that was really uncomfortable to you at the time you first tried it?
42. How do you like to spend a rainy day?
43. What's your hidden talent?
44. What did you enjoy most about school?
45. Who is your hero, and why?
46. Share one highlight from your grade school days.
47. Who is one a big role model for you when you were young?
48. What was the happiest moment in your life?
49. What was a defining event in your life?
50. Who is your favorite fictional character, and why?
51. Was there ever a time when you were truly frightened for your life?
52. What is one quote or saying you most appreciate?
53. How do you feed your soul? Food? Music? Other?
54. If you had one day to live over again, what day would you pick?
55. What is one thing you might change about your community?
56. If your house was burning down, what is one object would you try to save?
57. What do you consider the most important event of your life so far?
58. What do you think is the secret to a good life?
59. What do you value most in life?
60. What gift have you received that you will always treasure?
61. What is your motto in life?
62. What would you like to be known for?
63. Describe a real-life situation where you stood up for someone/something, or saw someone else do this.
64. Describe one experience you have had where you took a huge leap of faith.
65. Describe one past action (big or small) you took to improve the quality of your life.
66. Describe your own outlook on life in six words.
67. What one thing do you think would create peace in the world?
68. What product would you refuse to promote?
69. What is the one thing you can't live without?
70. What is the best thing that has ever happened to you, and why?
71. What is important to you in your life right now?
72. How are you like your mom or dad?

73. What favorite color are you and how does being that color make you feel? (Example, I am purple.)
74. If you were to hang out with one historical figure for the day, whom would you choose and why?
75. What is a typical day like for you?
76. What is one thing that not many people know about you?
77. What is that one thing which makes you different from most people?
78. What will you be like when you are 98?
79. What word might you add to the dictionary if you could, and what would it mean?
80. What might be a perfect afternoon for you?
81. What is your favorite book? Why?
82. What is thing you're looking forward to this summer? (or fall, winter, spring?
83. Which letter of the alphabet describes you best?
84. Who has been the greatest influence in your life?
85. Who is the most influential person in the world today?
86. What is the hardest thing you have ever done?
87. What do you do first thing in the morning?
88. What do you think is the greatest invention in your lifetime and why?
89. What in your opinion is the greatest invention ever?
90. What is the most beautiful thing you have ever seen in nature?
91. What is the kindest thing that someone has ever done for you?
92. What two words best describe you?
93. What is the most recent movie/book that you have seen/read?

Lighter Check-in Prompts

Good questions to use once a group is more personally connected.

1. Do you believe in extraterrestrials or life on other planets?
2. Do you believe in ghosts?
3. Which was the funniest prank played on you, or played by you?
4. What's the best concert you've ever attended?
5. What was your favorite bedtime story as a child?
6. What is your funniest family story?
7. What is your earliest memory?
8. What is the most fun thing you did in school?
9. What is the silliest thing you have heard people say about you?
10. What was the most outlandish/wild thing you ever did? Tell us about it.
11. What is the weirdest thing you have ever eaten?
12. What is the worst thing your mother ever made you eat as a child?
13. What was the worst thing you ever had to wear to school?
14. If I gave you $10,000, might you use it?
15. If you could pick a new first name for yourself, what might it be?

16. If you were a cartoon character, which one would you prefer being?
17. If you were a superhero, what would your super-name be? What would your superpower be?
18. If you were to write an autobiography, what title might you choose?
19. If you could anywhere in the world, where might you go?
20. If you could choose an imaginary friend, who would you choose and why?
21. If you were an animal, what animal might you be?
22. What's your favorite piece of office equipment (can be a simple one)?
23. What is your perfect pizza?
24. What makes the world go around?
25. If you had your human body, but the head of an animal, what animal would you pick?
26. If you could go back in time and change history, what might you change? Why?

Appendix B: Sample Runsheet

Regional Kindergarten Readiness Network
Learning & Strategy Design Session

Dates	Dinner: Tuesday May 8, 2018 5:00 PM - 8:00 PM (dinner included) Convening: Wednesday May 9, 2018 8:30 AM - 5:00 PM (breakfast at 8:00)
Location	Dinner: Barlow, 737 SW Salmon St, Portland OR 97205 Convening: World Forestry Center, 4033 SW Canyon Rd., Portland, OR 97221

Proposed Meeting Purpose

Align around a draft strategy and initiatives for advancing Kindergarten Readiness in the tri-county region as a cross-sector network.

Proposed Meeting Outcomes

Connecting	We have deepened trust and relationships across participants based on shared values & intent.
Learning	We have a shared understanding of the system dynamics surrounding Kindergarten Readiness, and have identified gaps in our current knowledge as a group.
Aligning	We have a shared strategic intent (i.e. goal and scope) for our network and have agreement on moving forward with this work together toward a formal network launch in September (9/24-25).
Working	We have commitments to immediate next steps, including engaging others, conducting family interviews, and refining learning around potential solutions drafted at this session.

Day 1 Dinner

TIME	INTENT	LEAD	HOW	MATERIALS
3:00	Prepare the space	HE/RG/ PK/DR	▪ Set up registration desk/area ▪ Post and distribute materials for morning ▪ Confirm room setup	❑ Put out nametags ❑ Contact list ❑ A/V, Screen ❑ Post-its (large) ❑ Flipcharts – Flow for the evening, ❑ Put hex post-its and sharpies at tables
		CONNECTING AROUND SHARED VALUES		
5:00-5:45 45m	Building connections among participants (drinks & hors d'oeuvres)	Health Share as hosts DR	▪ Reception for informal networking ▪ Health Share team facilitates introductions as needed	
5:45-6:00 15m	Welcome Aligning; Why we're here, the importance of this convening (salads plated, at tables, first course)	PK PK Janet	▪ Welcome: Why we're here, why this group was invited, and what we hope to do together in the next few days ▪ The importance of this group: How things got to where we are, how this group came about, why we must align our work to ensure all families and children are ready for Kindergarten; introduce the Program Team. ▪ Who's in the room. Your tireless and visionary work (especially early learning folks) over the last decade has helped us to get engaged. We have resources to bring to the table, to help us all set a vision and work toward it together. ▪ Janet, Health Share CEO will Introduce Gov. John Kitzhaber – share background and inspiring vision to create early learning hubs and coordinated care orgs to get health into community with social determinants of health.	❑ Post-its (large) ❑ Heather graphic recording via iPad, projected on screen

TIME	INTENT	LEAD	HOW	MATERIALS
6:00- 6:30 30m	Aligning: Challenging everyone to move fast and work deeply	JK	▪ Gov. John Kitzhaber ▪ Some points/messages for him to cover: challenge the participants to set and work toward a goal that's powerful and meaningful—with a focus on equity, fundamentally rethinking systems with a commitment to equity--not accepting mediocrity, not enough to only get some kids ready. Close the racial and socio-economic readiness gaps.	❑ Heather graphic recording, iPad projected on screen
6:30 DINNER, Family-Style Served at Tables				
6:30- 7:15 45m	Connecting: Dinner & Getting to know one another (second course served, family-style at tables)	HE	▪ 1-minute introductions (Set the pace—this is our practice for being spicy & brief) ▪ Take your hex post-it and put the pointy part at the top—that way, they'll fit together! ▪ "Make them good (and readable, and brief) because they will end up in the report!" ○ Name, Organization, a sentence on what you do there ○ One value that drives your work with children and families (written on hex post-it with sharpie) ○ One hope for our work together today and tomorrow (capture on flipchart)	❑ Hexagon post-its and Sharpies (at tables already) ❑ Flipchart paper for hex post-its ❑ Flipchart to capture hopes ❑ Instructions on iPad

TIME	INTENT	LEAD	HOW	MATERIALS
7:15-7:35 20m	Cueing up the next day (serve dessert in the bar)	RG	▪ Look at the core values that knit us together ▪ Quick introduction to collaborative innovation and compare and contrast on how collaboration usually happens, give example of big and concrete network we've supported ▪ Our plans for tomorrow ▪ How we want people to show up in the morning ▪ You've all been interviewed before coming to this session. We learned a lot from our conversations with you about what's working in the system, what barriers you're facing, what some key issues/dynamics are in this work. We will have a systems map on the wall in the morning that themes everything we've learned from each other. ▪ When you walk in, take a few minutes to review the map. We'll have some post-its and sharpies next to the wall – write down your <u>questions or any insights you think are missing on the map</u>, one per post-it and hold on to them. ▪ More doing, less talking. Rapid pace, work quickly, be comfortable with good enough. This is the first stage of stakeholders. We will have time to incorporate more people in our next rounds. ▪ Use sketching metaphor	❑ Share picture of a systems map on iPad ❑ Share picture to illustrate sketching metaphor
8:00	**Adjourn**		▪	❑

Day 2 Session

TIME	INTENT	LEAD	HOW	MATERIALS
7:00-8:30	Prepare the space	HE/RG/PG/DR	▪ Set up registration desk/area ▪ Post and distribute materials for morning ▪ Confirm room setup ▪ Take ‘values’ hex post-its and cluster them on the wall	❑ Put out nametags (with table assignments) & agendas, goal/critical shifts at table settings ❑ Contact list ❑ A/V, Screen ❑ Large systems map ❑ Theme area post-its (large) ❑ Flipcharts – Flow for the day, Idea Store, Learning Agenda, Guidelines, Creative Tensions
SESSION GOALS & AGENDA				
8:00 BREAKFAST AVAILABLE – Remind people to review systems map				

TIME	INTENT	LEAD	HOW	MATERIALS
8:30-9:00 30m	Connecting: Check-ins Aligning: Orient everyone to a different approach Logistics: agenda, housekeeping Aligning: Context and guidelines	DR RG/HE	▪ Quick one-word check-ins, and introduce anyone new. (10) ▪ Who's in the room and why. Point toward the 'values' hex-post it clusters on the wall. (2) ▪ What we've done so far, and why (3) ▪ Quick agenda review, logistics (2) ▪ Flow of the day: This morning is about understanding where things are now, aligning around a picture of where we want things to be, and what needs to change to close the racial and socio-economic Kindergarten readiness gaps and engage families to radically transforming the regional systems of support. This afternoon is about coming up with next-step solutions and what we could possibly do about it together. (5) ▪ What we're doing: Moving from insight to action 　○ Push for good, not perfect decisions and solutions 　○ Leave with clear action steps and commitments ▪ Agreements (2) ▪ Permission to move fast, drafting and deciding on "good enough" to proceed. Shorter meeting = Higher intensity to get work done ▪ Creative Tensions (2) ▪ Some tools: Learning Agenda, Deep Dive List, Idea Store (2) ▪ Housekeeping (bathrooms, cells, WIFI, visual release) (2)	❑ Presentation on Collaborative Innovation compared to collaboration as usual Charts (HE): ❑ Flow on the wall ❑ Idea Store ❑ Learning Agenda ❑ WIFI code ❑ Agreements ❑ Creative Tensions
ESTABLISHING SHARED INTENT				

TIME	INTENT	LEAD	HOW	MATERIALS
9:00- 9:25 25m	Aligning: Confirming working goal & scope of work	HE/RG	▪ We are coming together across various personal and organization interests in this work, and different perspectives on why it's important (2) ▪ Present working goal and ask: If there was 1 thing about this goal, what would it be? (10) ▪ Present focus, frame, and scope for our work together, and get revisions and consent from the room (10) ▪ Geographic focus (based on map of where kids are concentrated (5)	❑ Flipchart ❑ Markers Charts: (HE) ❑ Working Goal ❑ Focus & Frame, Scope ❑ Map of where kids 0-5 yrs (Medicaid members) live in the tri-county region (DR/PK)
UNPACKING & CONFIRMING INTERVIEW INSIGHTS				
9:25- 9:30 5m	Learning: Insight mining process	HE	▪ Why we're doing this: As mentioned, you've all been interviewed before coming to this session. We learned a lot from our conversations with you about what's working in the system, what barriers you're facing, what some key issues/dynamics are in this work. The systems map on the wall themes what we've learned from each other. ▪ Daesha, Peg, and Christine are going to walk through a high-level review of the themes and insights. ▪ While they talk, <u>silently</u> reflect on key insights you believe are missing. We're talking about critical ones, maybe 2-3 that you would add. Write down your <u>2-3 additional insights</u>, one per post-it and hold on to them. We'll get to them after the Health Share team walks us through the map. ▪ Show an example of good and bad post-it. ▪ After we've firmed up the system map, we'll then pull up the most 'critical shifts' we think need to happen across the system to achieve our goal.	❑ Post-its (small) and Sharpies for each participant ❑ Blue tac, tape ❑ Example of good and bad post-it

TIME	INTENT	LEAD	HOW	MATERIALS
9:30- 10:15 45m	Learning: Mapping emerging forces, barriers & opportunities in the early childhood system	PK/DR/ CB RG/HE	▪ Walk through the map at a high level (10-15m) ▪ *One more thing: We have a lot to cover so we're going to keep moving fast. Remember SPICY & BRIEF and not debating but clarifying and adding quickly to the shared picture* ▪ Ask for: (25) o Changes/additions from whole group, 1 post-it per/person at a time—Say it and stick-it ▪ Pull out and name any big "whole system" issues (5)	❑ Post-its (small) and Sharpies for each participant ❑ Blue tac, tape ❑ Example of good and bad post-it
10:15 – 10:30 (15m) BREAK				
			IDENTIFYING CRITICAL SHIFTS	
10:30- 11:15 45m	Learning: Develop pool of shifts	HE	▪ Describe critical shifts: Here's what's happening now and here's how we want things to be (<u>not solutions, which we'll do the afternoon</u>), can by org-level, community-level, industry-level, policy-level, etc., can relate to any lever/strategy area (5) ▪ Show examples of good and bad shifts (5) ▪ Share top shifts from the Program Team (5) Instructions to teams: (5) 1. Working in teams of 2-3, review the current shifts and identify (1) if there is a missing shift based on the system map, and (2) one shift you think we need to most work on together 2. Work for 10 minutes (10) 3. Choose your one top shift, and chart it on 12x12 post-it (5)	❑ Flipchart ❑ Slides on shifts (sample key shifts, examples of solutions versus shifts) ❑ Chart: Top 10 shifts from the Program Team ❑ Critical shifts worksheets (RG) ❑ Critical shifts handout (already in their packets) ❑ 12x12 post its (HE)

TIME	INTENT	LEAD	HOW	MATERIALS
11:15-12:00 45m	Aligning: Refine and prioritize critical shifts	RG	▪ Each group present top shift—quickly! (15) ▪ Reconcile all key shifts generated: Group (by strategy area), combine, and refine (15) ▪ Have people vote on shifts using voting dots (5) ▪ ID top shifts based on voting. (5) ▪ *Check: Do these shifts represent what most needs to happen to advance toward our goal? (3)* ▪ Learning check: Do any of our top shifts require more research? That's okay; we can work with them and learn as we go (add to learning agenda list) (2)	❑ Voting dots (3 per participant) ❑ Learning agenda chart
12:00-12:45 (45m) LUNCH				
			GENERATING DRAFT SOLUTIONS	
12:45-1:30 45m	Making: Generate ideas to make shifts happen	HE	▪ Form teams (vote with your feet) for top shifts: "Who wants to work on each shift (you can choose only one for today)" (5) ▪ Task In your groups: ○ Put up efforts that are already happening ○ Make sure to use the following ideation constraints ▪ Examples of good and bad ideas (mini-lecture) (10) ▪ Designate facilitator/timekeeper and presenter for each group ▪ 10 ideas in 10 minutes! (10) ▪ Review ideas and add 10 more ideas as a group (15)	❑ Timer on projector ❑ Mini-lecture on ideation (examples of helpful and unhelpful ideas) ❑ Ideation constraints: ○ It contributes to your key shift ○ It's concrete and specific ○ We can create a pilot within 6 months

TIME	INTENT	LEAD	HOW	MATERIALS
1:30- 2:15 45m	Aligning: Review and vote on top ideas	RG	▪ Ask each group to prioritize their top idea (10) ▪ Each group share their shift and top initiative idea (15) o Any clarifications? Is each idea clear enough for now? o Any duplication of effort across ideas? o Does this set of initiatives add up to potentially transformational work? o If not, what's missing? What might we need to change? o Any rogue idea that someone wants to work on? ▪ Refine shifts/ideas as needed (10) ▪ We'll learn and adapt, so it doesn't have to be perfect (artist analogy) ▪ Impact/feasibility matrix (only if necessary) ▪ Whole group use voting dots to hone down list to 3-4 highly promising INITIAL initiatives that the group can support (or at least consent to). (10)	❑ Flipcharts ❑ Sharpies ❑ Voting dots
2:15- 2:20 5m	Making: Set up Concept Development	HE	▪ Explain process: ▪ Small groups form for each of the top ideas ▪ ID a presenter and note taker ▪ Build your idea into a working concept using worksheets, individually 1st ▪ Sketch out concept as a group. Don't debate, but add to, the concept—this is more generative and less evaluative at this point ▪ When you have 10 minutes left, prep your presenter to pitch your idea to your testers—and make your poster ▪ BONUS POINTS if you develop both a Short-term AND Longer-term working concept	❑ Concept worksheets (RG) ❑ Flip chart paper and markers for each group
2:20-2:35 (15m) BREAK				

TIME	INTENT	LEAD	HOW	MATERIALS
2:35- 3:05 30m	Making: Concept Development	HE/RG Program team	▪ Form teams, ID presenter and note taker ▪ Individual work (5) ▪ Small group work (20) ▪ (Program team splits up to support each group – make sure they are making, not talking.)	❑ Concept worksheets (RG) ❑ Flip chart paper and markers for each group
3:05- 3:40 35m	Learning: Pitch Concepts with whole group	HE	▪ Pitch your concept for how to make your critical shift happen, from each small group, to the whole room (3 minutes per concept). (15) ▪ Clarifying questions from large group to teams (5) ▪ Round of quick feedback for each group — (10) o One think you like about the idea o One way to improve the idea o One thing that doesn't work for you. ▪ Each group is responsible for taking notes on the feedback ▪ Examine the whole set of initiatives: Redundancy? Gaps? (5)	❑ Flipchart for note-taking ❑ Sharpies
3:40- 4:05 25m	Making: Refine Concepts	HE	▪ Concept groups develop the next generation of their concept, integrate feedback: More detailed, more powerful, more compelling, more doable ▪ Bring concept to "Solutions Gallery"	❑ Flip chart paper and markers for each group ❑ "Solutions gallery"

TIME	INTENT	LEAD	HOW	MATERIALS
4:05-4:15 10m	Connect ideas into strategy map, capture who will work on which ideas	RG	▪ Summarize the set of ideas and reassess how the ideas all pull up into cohesive strategy ▪ **Ask: Write your name below the initiative that you would want to work on. If there is anyone else we should recruit for IG's, list their name too** ▪ Anything still missing to help us achieve our goal? ▪ Where does that put us? Walk through what we have done over the last day and a half. ▪ Process list of Learning Agenda items. Anything final to add?	❑ Flipcharts ❑ Sharpies ❑ Learning Agenda
MAPPING OUR WAY FORWARD				

TIME	INTENT	LEAD	HOW	MATERIALS
4:15- 4:50 35m	Aligning: Mapping next steps & a process forward	RG HE PK/DR/ CB	▪ What we'd like to do next is figure out a way forward with you so we want to test some thinking about that with you. ▪ What is an Innovation Network and how do they work? (structure, process, people, funding). Design Team, role. (10) ▪ 7 ways the work gets done. We all own this work together but a program team will provide the glue and platform for the work. (5) ▪ Where we are in the process: CI Roadmap, emphasize empathic listening process as next step – "It's everyone's responsibility, but it's our job" (10) o Conduct empathy interviews o Work hand in hand with key partners close to lived experience to offer co-design sessions o Invite folks with lived experience to September ▪ First session is different: Fast and rough. Next session will be formal launch where we'll review what we've come up with here and go deeper with a larger group. ▪ Q&A on how they work ▪ **The ASK:** If we were to move forward in developing a network to work on this issue together, who is interested in being a part of that? Stand up. (10) ▪ Working assumptions (about funding, roles, etc.) ▪ What are our IMMEDIATE next steps? Will people commit to monthly calls in their initiative groups to refine our thinking in advance of the launch meeting in September?	❑ Innovation Network presentation ❑ Flipchart ❑ Markers ❑ Presentation on suggested next steps and work leading up to launch convening ❑ "You are here" map (handout) and slide

TIME	INTENT	LEAD	HOW	MATERIALS
4:50- 5:00 10m	Connecting: Reflections & Appreciations	RG/PK	▪ What's most jazzed you about our work together? (popcorn) ▪ What's your biggest hope for how this group can make a difference? (each person) ▪ We'll follow up soon about next steps and dates for a next meeting ▪ Evaluation sheet, and of Day +/-	❑ Evaluation handout (DR)
5:00	Close		▪ Facilitators and Program Team Huddle	

CoCreativeConsulting™

Materials

- ❑ Hex post-its (CC)
- ❑ 40 3x3 yellow, light blue, etc. post-its (HS)
- ❑ Big square post-its (CC)
- ❑ 12x12 post-its (CC)
- ❑ 40x Sharpies (regular only) (HS)
- ❑ 3x self-adhesive flipchart pads, plain white, vertical (HS)
- ❑ 2x Sets of markers for flipcharts (HS)
- ❑ 3x Easels (HS)
- ❑ Blue tape (HS)
- ❑ Goo tac (CC)
- ❑ Voting dots (CC)
- ❑ Intuition pumps (CC)
- ❑ Graphic recording materials (CC)
- ❑ Screen for graphic recording (HS)

Creative Tensions

- **Fast** & Slow
- **Going Broad** & Going Deep
- **Tight** & Loose
- Long-term & **Short-term**
- **Introversion & Extraversion**
- Data-driven group & **Collective insight**
- Learning & **Doing**
- **Doing work & Deepening relationships**

Agreements

- Be Spicy & Brief! And balance time at the mic.
- All of us are smarter than any of us
- All take leadership (e.g. for putting concerns, issues on the table)
- Act from generosity (i.e. it will take more than our collective self-interests to succeed)
- Welcome disagreement, without being disagreeable
- ❑ We can reasonably have diverse, even divergent, goals and strategies and find common ground in the space of learning
- ❑ Confidentiality (Chatham House Rule, but can ask for info to stay in the group and can ask directly for permission to attribute info to them)
- ❑ Don't worry about time, but support the schedule
- ❑ Be present, this is an active process
- ❑ Write legibly!!

Make List (Pre-meeting)

- ❑ Nametags w/ first name large, last name small, organization below, including table assignments, with color code for seating (HS)
- ❑ 30x Agenda, contact list, critical shifts (HS)
- ❑ Slides (CC, MM)
- ❑ Pre-written hex post-its for system map (CC)
- ❑ Top critical shifts from Program Team on large post-its (CC)
- ❑ 10x runsheet (HS)
- ❑ 30x "You are here" map (HS to print)
- ❑ 10x Critical shifts worksheet 8.5x11 (CC)
- ❑ 10x Concept worksheet tabloid (CC)
- ❑ 10x runsheet (HS)
- ❑ 30x Evaluation handouts (HS)
- ❑ All Charts (CC, HE)
  - Agendas, Day 1 & 2
  - Goal Statement
  - Focus/Frame
  - Idea Store,
  - Learning Agenda,
  - Guidelines,
  - Creative Tensions
  - Good/bad post-it examples
  - Good/bad shifts examples
  - Top 10 shifts from the Program Team (12x12 stickies)
  - Ideation constraints

Appendix C. Giving & Receiving Effective Feedback

Despite participant's best intentions, certain behaviors can undermine trust and the effectiveness of collaboration in networks. Here is a non-judgmental way to give difficult feedback so that it's easier to hear and accept, which increases the likelihood of behavior change.

It's important to follow the flow below. It may feel awkward at first but as you experience the benefits of using it and get familiar with the language, it will feel more natural over time.

The basic form of effective feedback:

> **"When you_,** (behavior) **the impact on me is_,** (impact)
> **so I think___**(interpretation) **and I feel_**(feelings)**."**

The **Behavior** is a specific thing the person said or did (or says or does). Just describe the behavior very factually.

> "I was talking and you started talking before I finished…

The **Impact** is how the behavior affects you.

> …it made me lose my train of thought and I didn't get to say what I wanted to say.

The **Interpretation** is what you think the behavior means.

> That makes me think that you don't respect my opinion…

The **Feeling** is the specific emotional you experience as a result of the impact.

> …and I'm honestly angry about that."

We know that it can be challenging for people to share their personal feelings, even in such a formal way (although we do it whether we intend to or not). While you can leave out the last step in the feedback template below, it will significantly reduce the effectiveness your feedback.

Note that what is *not* included here is any statement about the other person's intent. Assigning malicious intent to others is often what deepens anger and unproductive conflict. After all, what's often driving the other person's unhelpful behavior are feelings of fear, anger, or resentment, so accusing that person of malicious intent only hurts more (not to mention that we're often completely wrong about the other person's intent).

This is only a general model. Find language that feels comfortable to you but try to follow the flow and include the four elements above. Some versions of this model leave out the Interpretation but we consider it important since it gives the other person the opportunity to understand and maybe challenge your interpretation.

Increasing the Effectiveness of Your Feedback

- Try to give feedback about a behavior as soon after it happens as possible…but not while you're too angry. Giving feedback sooner helps the other person identify the behavior you're talking about (after all, it's hard to remember a specific situation that happened two months ago). On the other hand, if you give feedback while you're anger, the high emotional content will overwhelm what you're saying and the other person will likely shut down.
- You can help others provide you with better feedback with a relatively simple question: "What did you see or hear that caused you to make that conclusion?" That helps the person focus on your behaviors rather than assigning intentions or motivations to you.