THE ART OF PARTICIPATORY LEADERSHIP

BUILDING STRONGER TEAMS, WORKING WITH COMPLEXITY, APPLIED PRACTICE

University of North Texas, Denton

Welcome to the Art of Hosting

Anyone working in the community sector knows that problems that we face are complex, multifaceted and seem impossible to solve.

We are confronted with increasing levels of uncertainty and unfamiliarity and yet our work is focused on trying to creating resilient, healthy communities that incubate belonging.

We have found over many years that the pathway to creating communities that exhibit these characteristics comes through engagement, dialogue and practice.

For the past 15 years a global community of practice called the Art of Hosting has been looking at how to create these conditions and how to provide leadership to sustain belonging and resilience in the face of complexity and uncertainty.

Our collective intelligence and community wisdom is accessible through strategic conversations and engagement. Creating and sustaining this kind of work requires that we learn and practice participatory leadership in which diversity and inclusion become the ways we learn, plan and implement sustainable actions.

The Art of Hosting is a three-day learning workshop in which we look at:

- Personal practices that allow anyone to lead in times of uncertainty.

- Facilitation methods to work with the dialogue to harvest the collective intelligence of people in groups, organizations and communities and to create peer learning and mentoring opportunities.

- Strategic planning that takes into account complex dynamics and that prioritises learning and participatory planning and action.

During our event you will both learn about and experience:

- Participatory dialogue methods such as World Café, Pro Action Café, Open Space Technology and Circle, all processes that help tap the collective intelligence of groups.

- Tools for working with equity, difference and diversity while holding a participatory lens on leadership and collaboration.

- Personal leadership practice for stepping into situations where you are uncertain, afraid or stuck.

- Theory and practice of working with complexity and getting a handle on "impossible" situations.

- Tools for designing strategic innovation that is inclusive and sustainable over time and that work with the complexity of our time instead of against it.

Welcome...
About this workbook

This workbook is your reference journal with the purpose of strengthening your learning by offering the key materials of this training as well as a place for you to take notes to help you personalize, remember, focus and deepen your understanding and practice. It shares basic assumptions and worldviews underpinning the Art of Hosting (AoH) / Art of Participatory Leadership (AoPL).

It is a updated to include the most current learning on these topics and has materials particular to your training as well as other associated methodologies and topics for further learning. The workbook includes several methodologies and practices that have been developed from the global community of practitioners as well as articles and materials developed by Harvest Moon Consultants and Associates. Attribution is noted where appropriate.

All models are available for use under creative commons or noted copyright and are offered here for you to use, improve, and share in your work. This Workbook also provides you with resources - books, links, and information and where to go next – in your learning and/or reading.

Workbook developed by Harvest Moon Consultants Ltd.
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THE ART OF HOSTING
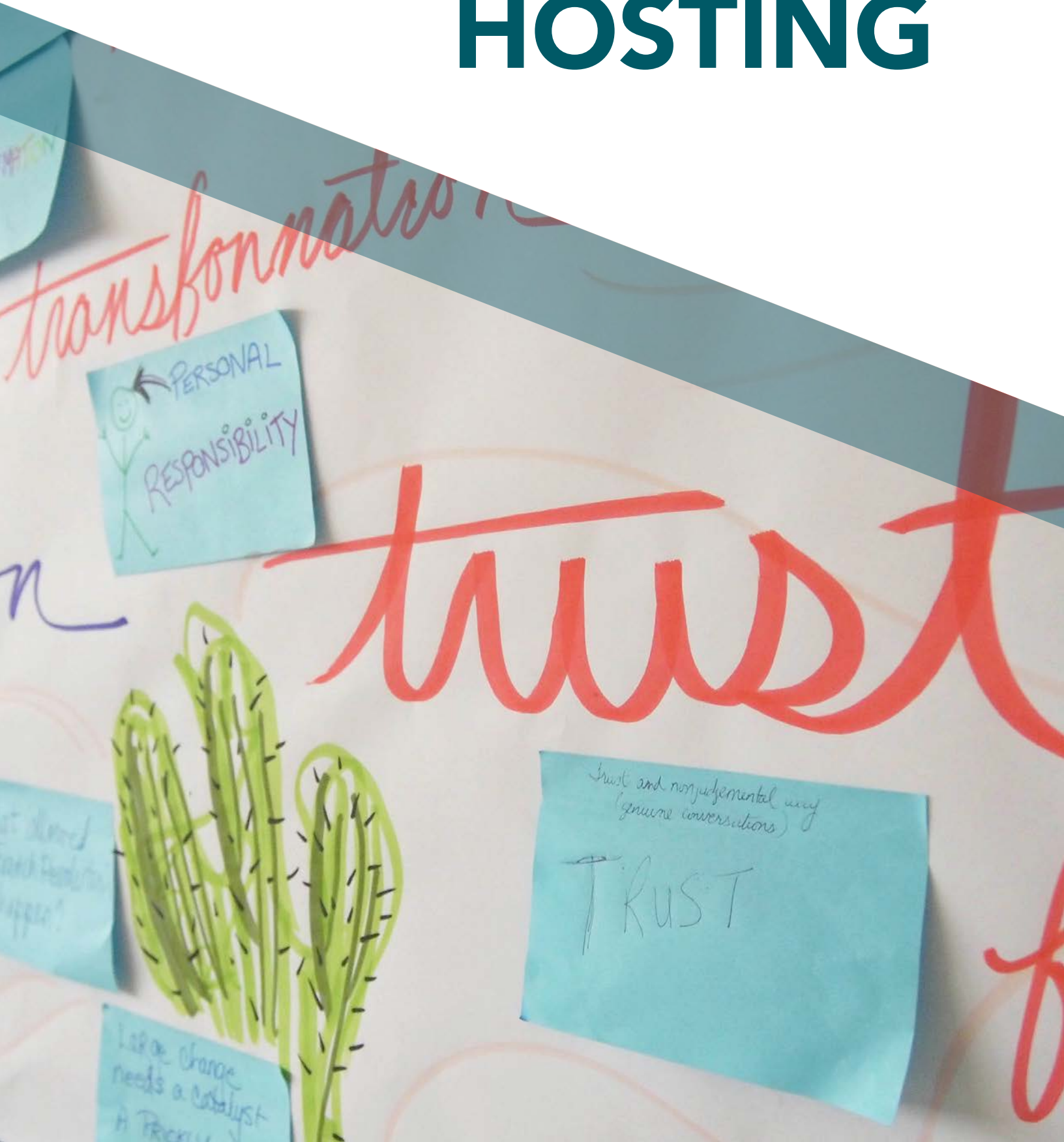
What is the Art of Hosting?
A definition

THE ART OF HOSTING offers practices, ways of thinking and methodologies that help us to better respond to a world that is becoming increasingly complex and fragmented, where true solutions and innovations lie not in one leader or one viewpoint, but in the bigger picture of our collective intelligence. In our institutions, communities and families, it gives us ways of working and leading that acknowledge and makes use of our interconnectedness, and help us to engage across and more fully benefit from the diversity of our perspectives and backgrounds as well as connecting to our shared values and purpose in our work in the world.

THE ART OF HOSTING helps increase all of our capacity to step into the challenges we face with more agility, creativity, skillfulness and ability to collaborate and learn together.

THE ART OF HOSTING is a testing ground for those seeking to find new, effective and healthy patterns for organizing, innovating and interacting, to create new forms that serve us better.

THE ART OF HOSTING is a practice ground for all who aspire to bring out the best in others. It is based on the assumption and experience that human beings have an enormous untapped wealth and resilience. The leadership approach called the Art of Hosting (AoH) activates the collective intelligence in a group to find new solutions to the increasing challenges of the world of work today.

As leaders we need to be more flexible and creative in the context of accelerating changes, increased complexity, and challenging economic realities. The traditional command-and-control type of leadership alone is no longer appropriate for many of the challenges we face. In the current climate, tapping into the potential held in the organization is crucial. Inviting everyone to participate with their diverse perspectives is the key to releasing this potential.

AoH practice is based on convening strategic dialogue and conversations as drivers for development and change. This form of leadership is already used with successful results in multiple sectors (government, NGOs, and private settings) particularly in the following areas:

- Strategic organizational development.
- Thinking Strategically and Facilitating large-scale conversations around strategic questions.
- Stakeholder involvement.
- Personal Leadership Development and ability to take wise action that achieves meaningful and lasting results.
- Leading and doing work that is connected to real needs, values and ethics.
- Leading Change and innovation in a collaborative way.

'A' Definition

The AoH is an emerging group of methodologies for facilitating conversation in groups of all sizes, supported by principles that help maximize collective intelligence, integrate and utilize diversity and minimize/transform conflict. Processes facilitated in this way tend to result in collective clarity and wise action, and sustainable, workable solutions to the most complex problems. The approach ensures that stakeholders buy into the process (because they participate in the design and the process is by definition transparent) and make ongoing feedback, learning and course correction a natural and efficient part of work and life.

The Art of Hosting: A few assumptions

New Solutions are Needed

The Art of Hosting is built on the assumption and experience that we need to find new solutions for the common good, whether in corporations, government, education, non-profits, social movements, communities, or families. These solutions are more comprehensive and more readily found and owned if they are co-created by the between us. The time is now.

New Solutions Grow Between Chaos and Order

If we want to innovate we have to be willing to let go of what we know and step into not knowing. In nature all innovation happens at the edge of chaos, or in the space between chaos and order (what we call the chaordic path). It is in the chaordic space that new connections are created and new possibilities emerge. - In The Art of Hosting we learn methodologies and practices that help us to navigate this space effectively, without exerting too much control, and without tipping too far into chaos.

Conversation Matters

It is common sense to bring more people together in conversation. It is the way we have done it in generations past, gathering round fires and sitting in circles. It is the way we occasionally taste now, building core relationships that invite real collaboration.

Meaningful Conversation can Lead to Wise Action

Human beings that are involved and invited to work together take ownership and responsibility when ideas and solutions must be put into action. Conversations that surface a shared clarity on issues of importance foster ownership and responsibility when ideas and solutions must be put into action. – Actions that come out of collective clarity are both wise and sustainable.

Paradoxes at Work

In hosting strategic and meaningful conversations we operate in a world that is not black or white – but rather full spectrum. We need to be able to operate in and hold paradoxes such as:

- Chaos and Order
- Content and Process
- Leading and Following
- "Warrior" and "Midwife"
- Small Group and Large Group
- Confusion and Clarity
- Fast and Slow
- Sacred and Irreverent

Instead of looking on discussion as a stumbling block in the way of action, we think it an indispensable preliminary to any wise action at all.

Pericles

Purpose of this Art of Hosting

- Build stronger teams and partnerships. Broaden the skillset within your group, work more effectively and enjoyably together, engage teams, organizations, and community stakeholders in meaningful conversations that promote resilience, belonging, innovation, and collective impact.

- Enhance your skills and abilities to work with complexity, uncertainty, and change. Develop leadership confidence for facing challenges that don't have clear solutions, use wise process planning architectures for small and large-scale initiatives, and host strategic conversations.

- Apply what you learn to change projects that important to you, your community, or your organization.

Participants in this Art of Hosting will…

Learn valuable approaches and tools for engaging stakeholders in meaningful conversations.

Develop a shared understanding of each other's work and opportunities for future and strategic collaborations.

Explore and gain clarity on how to address issues at the at the center of day-to-day decisions and practices in your workplace, team organization, or community.

Explore and identify new strategies and approaches for furthering their work in our community and/or systems.

Multiple Levels of Focus

AoH invites us to operate at four interconnected levels at once. The learning at each of these levels informs and is present in the subsequent levels, so that a natural hierarchy results. These four levels operate as characteristics of a whole and not as a linear path, but rather as characteristics of work.

Individual

- To continue to connect to our passion and reason for choosing a different way of leading in our communities

- To strengthen individual courage to lead as hosts

Team

- To train on the competencies of collective reflection and wise action

- To practice co-creating, co-deciding and co-hosting in order to host strategic meetings, focus groups, and community conversations

Community/Organization/Etc.

- To experience working in unity with other leaders

- To experience new organizational forms and work of co-creating relationships that serve the deeper needs and patterns in our community and world

Global

- To understand the bigger context that we are always part of

- To benefit from knowledge and experience of a global or "trans-local" network of practitioners and learners in this field

We have three days together to deepen a practice of being present, focusing on questions that matter, listening to each other and to what we create together, harvesting, and choosing wise action. It is our opportunity to be in the practice of thoughtfully doing the work that needs to be done in our organizations, community and world.

On Leadership

Margaret Wheatley

In fact, in this day and age, when problems are increasingly complex, and there simply are not simple answers, and there is no simple cause and effect any longer, I cannot imagine how stressful it is to be the leader and to pretend that you have the answer.

So, what I see in life-affirming leaders is that they are willing to say to people "I do not know the answer, but together we will figure it out."

So, they are also leaders who rely on other people's intelligence.

And a life-affirming leader is one who knows how to rely on and use the intelligence that exists everywhere in the community, or the school or the organization.

And so these leaders act as hosts, as stewards of other people's creativity and other people's intelligence.

And when I say host, I mean a leader these days needs to be one who convenes people, who convenes diversity, who convenes all viewpoints in processes where our intelligence can come forth.

So these kinds of leaders do not give us the answers, but they help gather us together so that together we can discover the answers.

Living Systems
A natural approach to organizing life

For three hundred years in the culture of the western world, since Descartes and Newton, western thinking has predominantly been influenced by rationalism. In this thinking there is a assumption that we have been able to figure things out and "be in control". We tend to view our organizations and communities as we view machines – as consisting of clearly defined parts with clearly defined roles and a predictable output.

In a complex world, this mechanistic view may not always be adequate to meet the complex problems and challenges we face. What if communities and organizations could be viewed as living systems as well?

Living systems exist everywhere in nature – bacteria forming colonies or ants coming together to form a system that is capable of creating an anthill. – Some termite nests even have air conditioning so the temperature stays the same inside the hill!

There are two exciting phenomena in nature and living systems:

- Nature has the capability to self-organize, i.e. it does not require someone specific to direct the organization instead of all who are involved participate in what is needed to achieve a purpose

- Self-organisation can lead to emergence = the emergence of totally new properties and qualities = 1+1 = 11 or something totally new and surprising.

What if organizations really are living systems and there could be a simpler way of organizing that opens up the possibility for emergence – provided the right conditions are in place?

What would our organizations and communities look like then?

Some Qualities of Living Systems:

- A living system only accepts its own solutions (we only support those things we are a part of creating)

- A living system only pays attention to that which is meaningful to it (here and now)

- In nature a living system participates in the development of its neighbour - an isolated system is doomed.

- Nature and all of nature, including ourselves is in constant change (without 'change management')

- Nature seeks diversity – new relations open up to new possibilities. It is not survival of the fittest – but everything that is fit – as many species as possible. Diversity increases our chances of survival.

- 'Tinkering' opens up to what is possible here and now – nature is not intent on finding perfect solutions, but those that are workable

- A living system cannot be steered or controlled – they can only be teased, nudged, titillated

- A system changes (identity) when its perception of itself changes

- All the answers do not exist 'out there' – sometimes we must experiment to find out what works

- Who we are together is always different and more than who we are alone - possibility of emergence. Our range of creative expression increases as we join others. New relationships create new capacities.

- Human beings are capable of self-organizing – given the right conditions

- Self-organization shifts to a higher order

AoH and Living Systems
A complement to traditional leadership

Traditional Leadership	AoH and Living Systems Complement
Mechanistic	Organic
Management by control	Leadership by trust
Executing procedures	Innovating process
No single person has the right answer, but somebody has to decide	Together we can reach greater clarity - intelligence through diversity
Silos/hierarchical structures	Networks
Leading by instructions	Leading by hosting
Top-down orders, often without full information	Top-down orders informed by consultation
Working without a clear purpose and jumping to solutions	Collective clarity of purpose is the invisible leader
Motivation via carrot and stick	Motivation through engagement and ownership
Seeking answers	Seeking questions
Results-oriented	Purpose-oriented - the rest falls into place
Chairing, reporting	Hosting, harvesting, follow up

People are intelligent, creative, adaptive, self-organizing, and meaning-seeking. Organizations are living systems. They too are intelligent, creative, adaptive, self-organizing, meaning-seeking.

Meg Wheatley

The Chaordic Path
The way to emergence and innovation

Innovation
Transformation
Collective Intelligence
Creativity
Emergence

CHAMOS | CHAOS | CHAORD | ORDER | CONTROL

Confusion
Conflict
Fear
Frustration
Judgement
Quitting
Attachment to outcome

CHAORDIC CONFIDENCE
The ability to lead and collaborate effectively in the chaordic space.
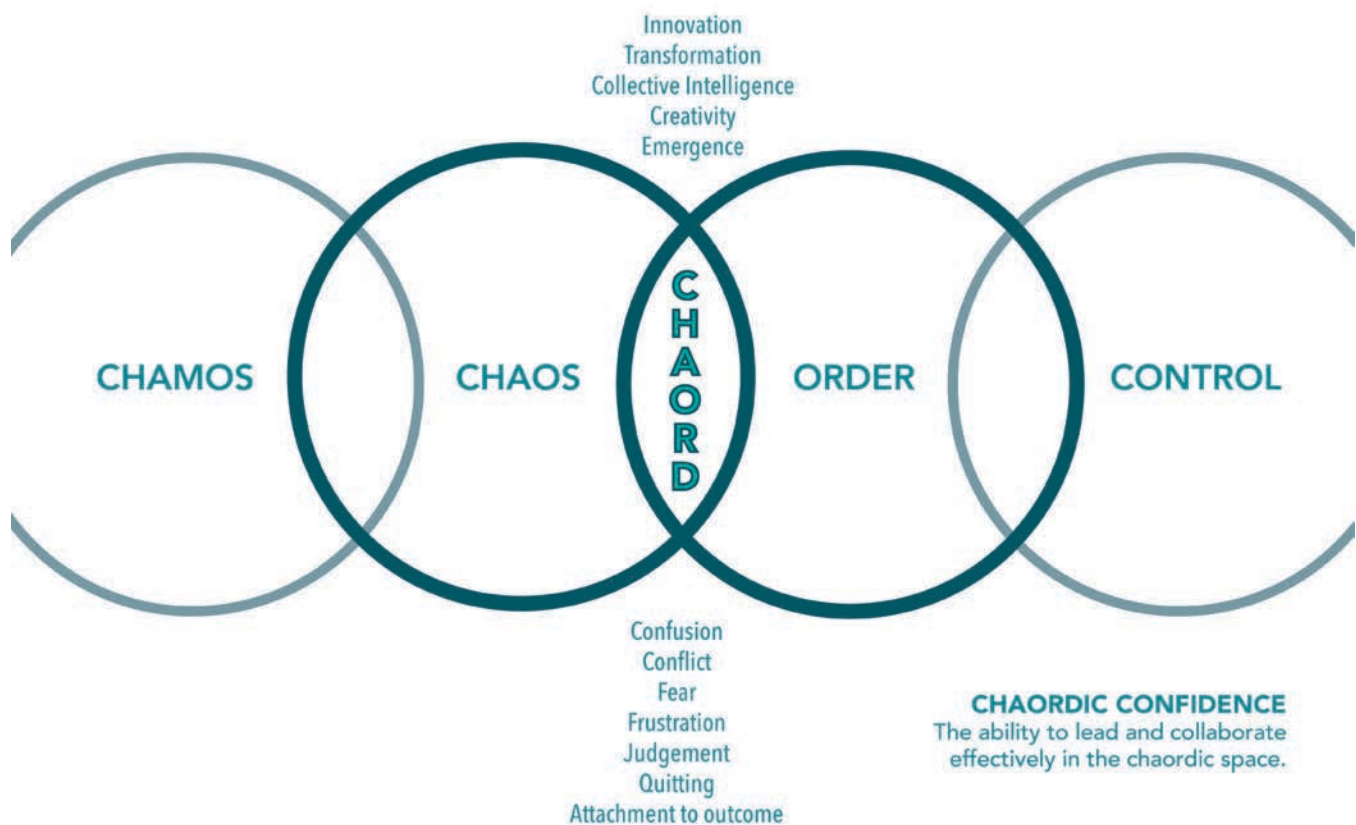
EMERGENCE: NEW CONSCIOUSNESS, NEW AWARENESS, AND NEW SOLUTIONS.

There is a path to take between Chaos and Order that leads us to the new, collective learning, real time innovation. Instead of relying on controlling every detail in our organizations or communities from the top down, many leaders today see the need to access the collective intelligence and collective wisdom of everyone, which can be, at times, a "messy" process until we reach new insight and clarity.

We are beginning to understand and treat organizations and communities more like living systems than static machines. After all, the chaordic path is the story of our natural world – form arises out of non-linear, complex, diverse systems. "At the edge of chaos" is where life innovates – where things are not hard wired, but are flexible enough for new connections and solutions to occur. New levels of order become possible out of chaos.

This "chaordic confidence" – the capacity we need to stay in the dance of order and chaos – supports a generative emergence that allows the new, collective intelligence and wise action to occur.

In this space of emergence, we leave our collective encounters with that which not one of us individually brought into the room. This requires us to stay in a transformative shift, though we may want to veer toward either chaos or order.

And in fact, we will move between chaos and order – this is the generative dance, an oscillation often seen in the natural world. A balance between two seeming polarities, which are instead compliments of each other.

As we move between chaos and order, individually and collectively, we move through confusion and conflict toward clarity. We are all called to walk this path without judgement – some will feel more comfortable with chaos, others with order. Both are needed as, together, we walk the edge that is between these two toward something wholly new.

On the far side of chaos is chamos – or destructive chaos. On the far side of order is stifling control. When we move toward either of these extremes, the result is apathy or rebellion. The very opposite of chaordic confidence, where the new cannot be born.

There is a path toward common ground, co-creation, and wise and strategic action. There is a "sweet spot" of emergence with tangible results. If we are looking for innovative, new solutions we will find them in a place between chaos and order – the chaordic path.

Chaos/Order is the Place for Leadership

The practice of leadership resides in the place between chaos and order. When facing new challenges that cannot be met with the same way we are currently working, we need to learn new ways of operating. It is during these times of uncertainty and increased complexity, where results cannot be predicted that leaders need to invite others to share diverse knowledge to discover new purpose and strategies and decide the way forward.

Order/Control is a Place for Management

The practice of management lies between order and control where activities need to be maintained and executed routinely so that a particular standard results. It is the place where "more of the same" is required. Therefore, when predictability is called for and where procedures and standards are clearly defined and need to be adhered to.

The Four-Fold Practice

Practice AoH

BE PRESENT
(Pre-Sensing)

PRACTICE CONVERSATIONS
(Participation)

HOSTING CONVERSATIONS
(Contribute)

COMMUNITY OF PRACTITIONERS
(Co-Create)

Being truly present, engaging skillfully in conversations, being a good host of conversations and engaging with others in co-creation, are all practices or skills that are easily understood but it takes a continuous practice to hone these skills.

1. BEING PRESENT - HOST YOURSELF

...host yourself first - be willing to endure chaos - keep the "space" or possibilities open - stay in the fire of the present...

Being present means showing up, undistracted, prepared, clear about the need and what your personal contribution can be. It allows you to check in with yourself and develop the personal practice of curiosity about the outcomes of any gathering. Presence means making space to devote a dedicated time to working with others. If you are distracted, called out or otherwise located in many different places, you cannot be present in one. For meetings to have deep results, every person in the room should be fully present.

Being present also means being aware of one's environment, other people and what impacts you and how you impact others.

Collectively, it is good practice to become present together as a meeting begins, be it through a welcome, a good framing, through "checking-in" to the subject matter or task at hand by hearing everyone's voice in the matter or as simple as

FOUR FOLD PRACTICE
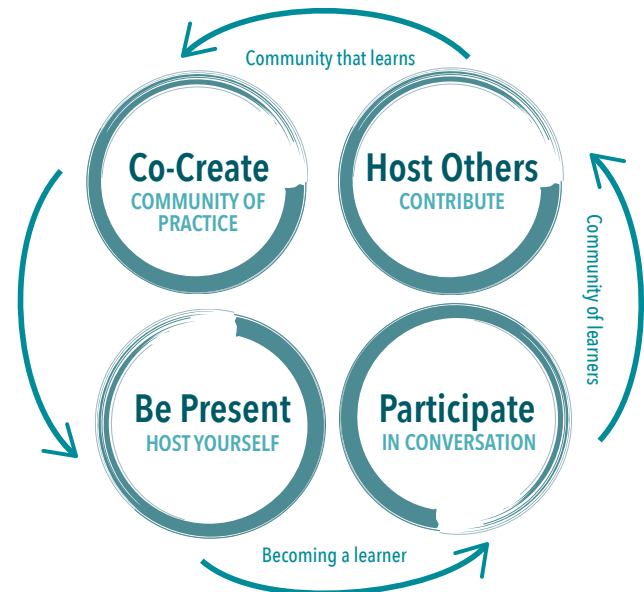
taking a moment of silence. Invite a collective slowing down so that all participants in a meeting can be present together.

2. PARTICIPATE IN CONVERSATION

...be willing to listen fully, respectfully, without judgment and thinking you already know the answer – practice conversation mindfully...

Conversation is an art, it is not just talk. It demands that we listen carefully to one another and that we offer what we can in the service of the whole. Curiosity and judgment cannot live together in the same space. If we are judging what we are hearing, we cannot be curious about the outcome, and if we have called a meeting because we are uncertain of the way forward, being open is a key skill and capacity. Only by practicing skillful conversation can we find our best practice together.

If we practice conversation mindfully we might slow down meetings so that wisdom and clarity can work quickly. When we talk mindlessly, we neither hear each other nor do we allow space for clarity to arise. The art of conversation is the art of slowing down to speed up.

3. Host Others - Contribute

...be courageous, inviting and willing to initiate conversations that matter - find and host powerful questions with the stakeholders – and then make sure you harvest the insights, the patterns, learnings and wise actions...

Hosting conversations is both more and less than facilitating. It is an act of leadership and means taking responsibility for creating and holding the "container" in which a group of people can do their best work together.

You can create this container using the seven helpers as starting points, and although you can also do this in the moment, the better prepared you are the better.

The bare minimum to do is to discern the need, get clear on the purpose of the meeting, prepare a good, powerful question to initiate the conversation and know how you will harvest and what will be done with that harvest, to ensure that results are sustainable and the effort was worth it.

Hosting conversations takes courage and it takes a bit of certainty and faith in people. We sometimes give short shrift to conversational spaces because of the fear we experience in stepping up to host. It is, however, a gift to host a group and it is a gift to be hosted well.

4. Co-Create

...be willing to co create and co-host with others, blending your knowing, experience and practices with theirs, working partnership...

The fourth practice is about showing up in a conversation without being a spectator, and contributing to the collective effort to sustain results. The best conversations arise when we listen for what is in the middle, what is arising out of the center of our collaboration. It is not about the balancing of individual agendas, it is about finding out what is new. And when that is discovered work unfolds beautifully when everyone is clear about what they can contribute to the work.

In a truly co-creative process it becomes irrelevant who said or contributed what – the gift is in the synergy and inspiration when we each build on each other's knowledge and the whole becomes much bigger than the sum of the parts.

This is how results become sustainable over time – they fall into the network of relationships that arise from a good conversation, from friends working together.

The collaborative field can produce unexpected and surprising results.

From a learner to a community that learns

As we learn to be truly present and engage in conversations that really matter – we become learners. As learners many doors are open to us. As we begin to host conversations and connect with other hosts – we become a community of learners or practitioners. As a community we own a much bigger capacity than as individual learners. As a community of individual practitioners or learners – truly becomes "a community that learns", that is where we really enter the collective intelligence.

Two Loops Model

Using emergence to take social innovation to scale

If we follow the trajectories of systems we see that they all have life cycles. They have a beginning, a middle, and an end. We can see many of our modern systems failing to sustain themselves in the complexity of our times.

Human systems, like systems in nature, don't tend to change through plans or dictates, but through emergence. If we want to support movements taking hold, the best thing we can do is foster critical connections between pioneers who are working on the ground to create fresh and relevant solutions.

At The Berkana Institute, we have been noticing and practicing four levels that help support the creation of new systems while old systems die. Each of these steps show up on the new / bottom curve.

1. Naming the work of pioneers.
2. Connecting pioneers into networks of shared interest and purpose.
3. Nurturing networks into deliberate communities of practices.
4. Illuminating the stories of communities of practice to help them become more far-reaching systems of influence. From the former fringe into a new social norm.

TWO LOOPS MODEL
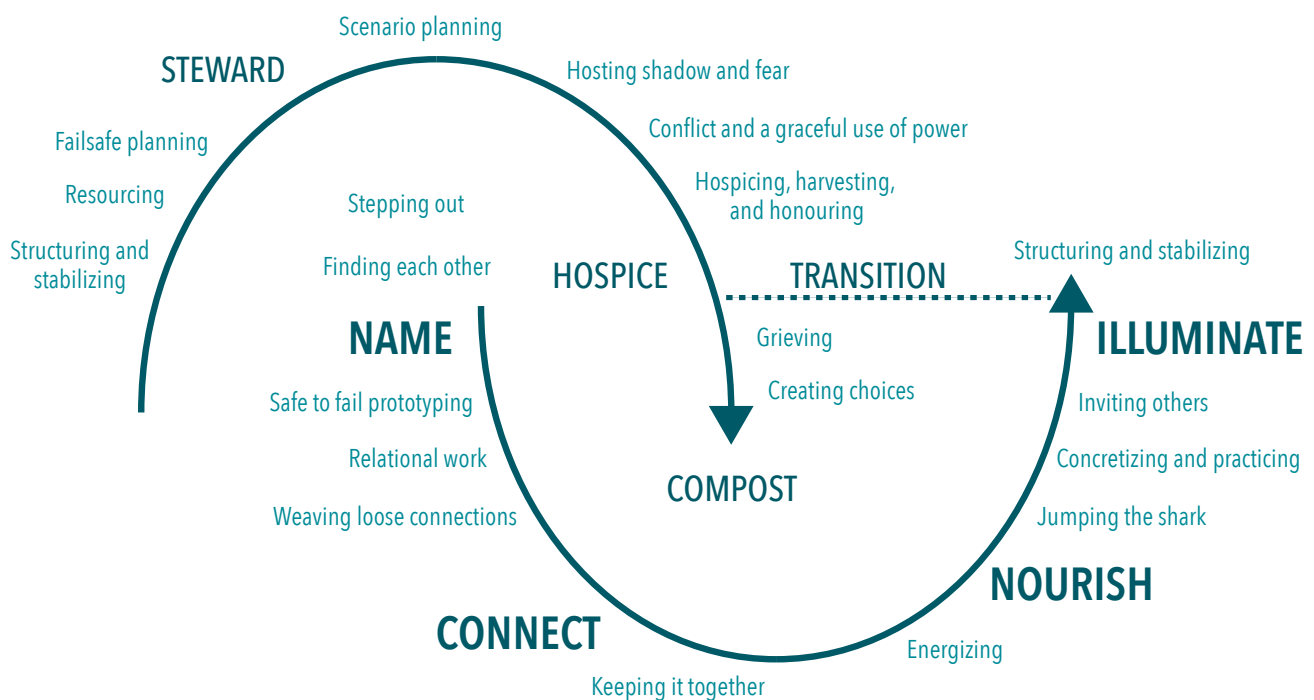
Cynefin
A framework

The Cynefin framework is a model used to describe problems, situations and systems. The model provides a typology of contexts that guides what sort of explanations and/or solutions may apply. Cynefin is a Welsh word, which is commonly translated into English as 'habitat' or 'place', although this fails 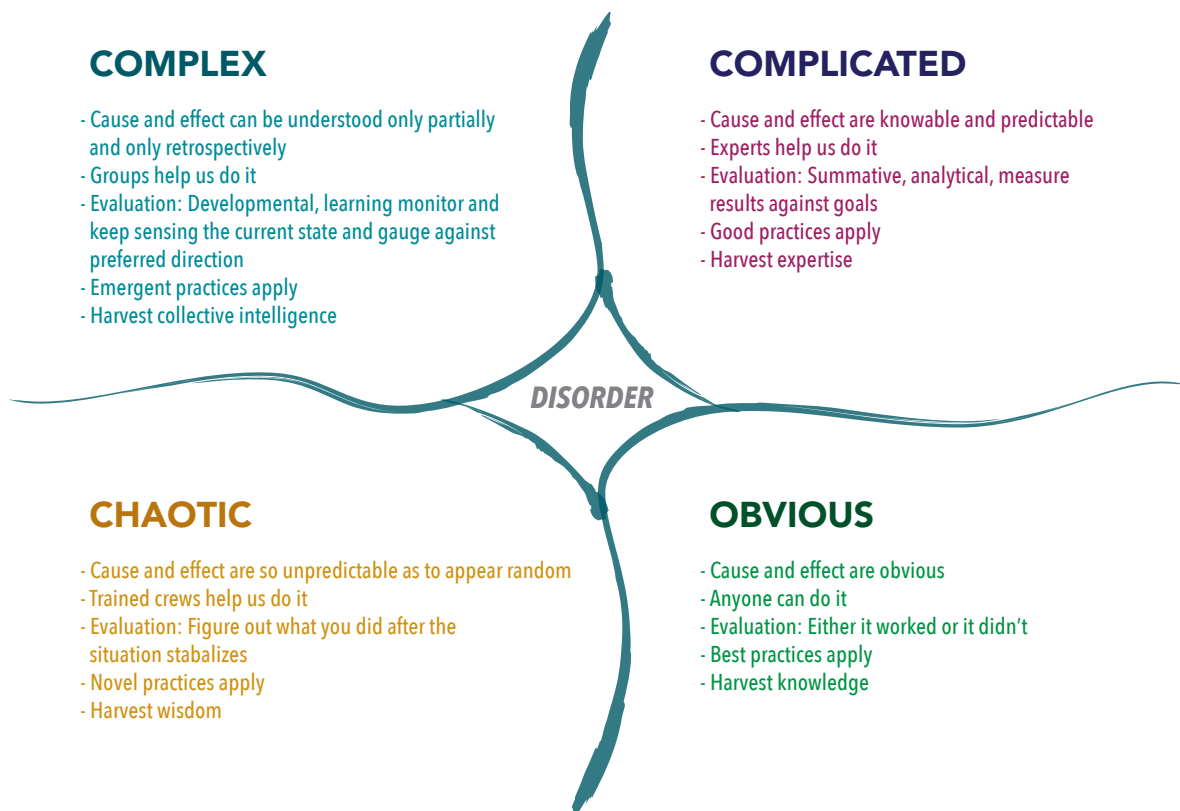to convey its full meaning. A more complete translation of the word would be that it conveys the sense that we all have multiple pasts of which we can only be partly aware: cultural, religious, geographic, tribal etc. The term was chosen by the Welsh scholar Dave Snowden to illustrate the evolutionary nature of complex systems, including their inherent uncertainty. The name is a reminder that all human interactions are strongly influenced and frequently determined by our experiences, both through the direct influence of personal experience, and through collective experience, such as stories or music.

The Cynefin framework draws on research into complex adaptive systems theory, cognitive science, anthropology and narrative patterns, as well as evolutionary psychology. It "explores the relationship between human beings, experience and context" and proposes new approaches to communication, decision-making, policy-making and knowledge management in complex social environments.

Description of the framework

The Cynefin framework has five domains. The first four domains are:

- **Obvious,** in which the relationship between cause and effect is obvious to all, the approach is to Sense - Categorize - Respond and we can apply best practice. We simply need to co-ordinate our response and get to work.

COMPLEX

- Cause and effect can be understood only partially and only retrospectively
- Groups help us do it
- Evaluation: Developmental, learning monitor and keep sensing the current state and gauge against preferred direction
- Emergent practices apply
- Harvest collective intelligence

COMPLICATED

- Cause and effect are knowable and predictable
- Experts help us do it
- Evaluation: Summative, analytical, measure results against goals
- Good practices apply
- Harvest expertise

DISORDER

CHAOTIC

- Cause and effect are so unpredictable as to appear random
- Trained crews help us do it
- Evaluation: Figure out what you did after the situation stabalizes
- Novel practices apply
- Harvest wisdom

OBVIOUS

- Cause and effect are obvious
- Anyone can do it
- Evaluation: Either it worked or it didn't
- Best practices apply
- Harvest knowledge

- **Complicated,** in which the relationship between cause and effect requires analysis or some other form of investigation and/or the application of expert knowledge, the approach is to Sense - Analyze - Respond and we can apply good practice. Co-operation is important, and good management and monitoring will ensure that the parts of the system are working well together and at peak efficiency for solving problems.

- **Complex,** in which the relationship between cause and effect can only be perceived in retrospect, but not in advance, the approach is to Probe - Sense - Respond and we can sense emergent practice. Here we need to foster ongoing collaboration and meaning making to continually understand the changing context and plan and implement effective responses to unsolvable problems.

- **Chaotic,** in which there is no relationship between cause and effect at a systems level, the approach is to Act - Sense - Respond and we can discover novel practice. In this case crises management comes into effect. You rely on your training and experience to make good choices until the situation stabilizes.

The fifth domain is **Disorder,** which is the state of not knowing what type of causality exists, in which state people will revert to their own comfort zone in making a decision. It is important here to be aware of your prejudices and preferences. Without understanding that there are different kinds of problems, it is tempting to believe that every problem can be solved in the same way.

In full use, the Cynefin framework has sub-domains, and the boundary between simple and chaotic is seen as a catastrophic one: complacency leads to failure.

Working with the Cynefin framework

As we move from simple problems to chaotic problems the nature of our leadership and decision making changes. The Simple and Complicated domains are characterized by problems that are generally "knowable." In other words, with an appropriate amount of analysis and research we can fully understand the dynamics of the system and make decisions accordingly. This is the realm of technical leadership. Examples of technical leadership includes scientific research, analytical thinking, traditional project management and strategic planning. Technical problems have knowable solutions. As you increase the level of complication you need to rely on more expertise to gather the knowledge you need, but in general technical solutions work very well in this space.

Once you cross the boundary between complicated and complex, you enter the realm of the unknowable. Complex problems are characterized by emergent phenomena. In other words, you will confront here results that are not predictable from simply knowing the starting places. Poverty, racism, culture, stigma, peace and conflict are all emergent phenomena. You cannot locate single causes, and even understanding a set of dynamics will not give you knowledge of the way emergence will unfold. Such challenges require adaptive and participatory leadership.

Adaptive leadership skills include improvisation, collaborative learning, resilience, resourcefulness and humility. Adaptive leaders are good at creating prototypes that result in knowledge about how the system will evolve. They are good at living in uncertainty and understand that failure means learning. Solutions and decisions about complex problems tend to be practice based, because context is so important. There are no finish lines and the moment one thing changes, the system changes too. This requires leaders that can hold on to a core purpose and intention for their work and rely on a variety of approaches for moving forward.

Participatory leadership is useful for addressing complex problems because leadership can come from anywhere, so ensuring that diversity, multiplicity of voices and collaborative decision-making takes place is essential to making good strategic choices.

Theory U
Presencing emergence

"Presencing" is bringing into presence, and into the present, your highest potential and the future that is seeking to emerge. Your highest future possibility is related to your own highest intention...it's being an instrument of life itself, to accomplish, in a sense, what life wishes for me to accomplish.

Theory U proposes that the quality of the results that we create in any kind of social system is a function of the quality of awareness, attention, or consciousness that the participants in the system operate from.

Since it emerged around 2006, Theory U has come to be understood in three primary ways: first as a framework; second, as a method for leading profound change; and third, as a way of being - connecting to the more authentic of higher aspects of our self.

Shifting The Inner Place From Which We Operate

During an interview, Bill O'Brien, the late CEO of Hanover Insurance, summarized his most important insights from leading transformational change in his own company. O'Brien said: **"The success of an intervention depends on the interior condition of the intervener."** We might say it this way: the success of our actions as change-makers does not depend on What we do or How we do it, but on the Inner Place from which we operate. The essence of that view is that we cannot transform the behavior of systems unless we transform the quality of awareness and attention that people apply to their actions within these systems, both individually and collectively.

Principles of Presencing
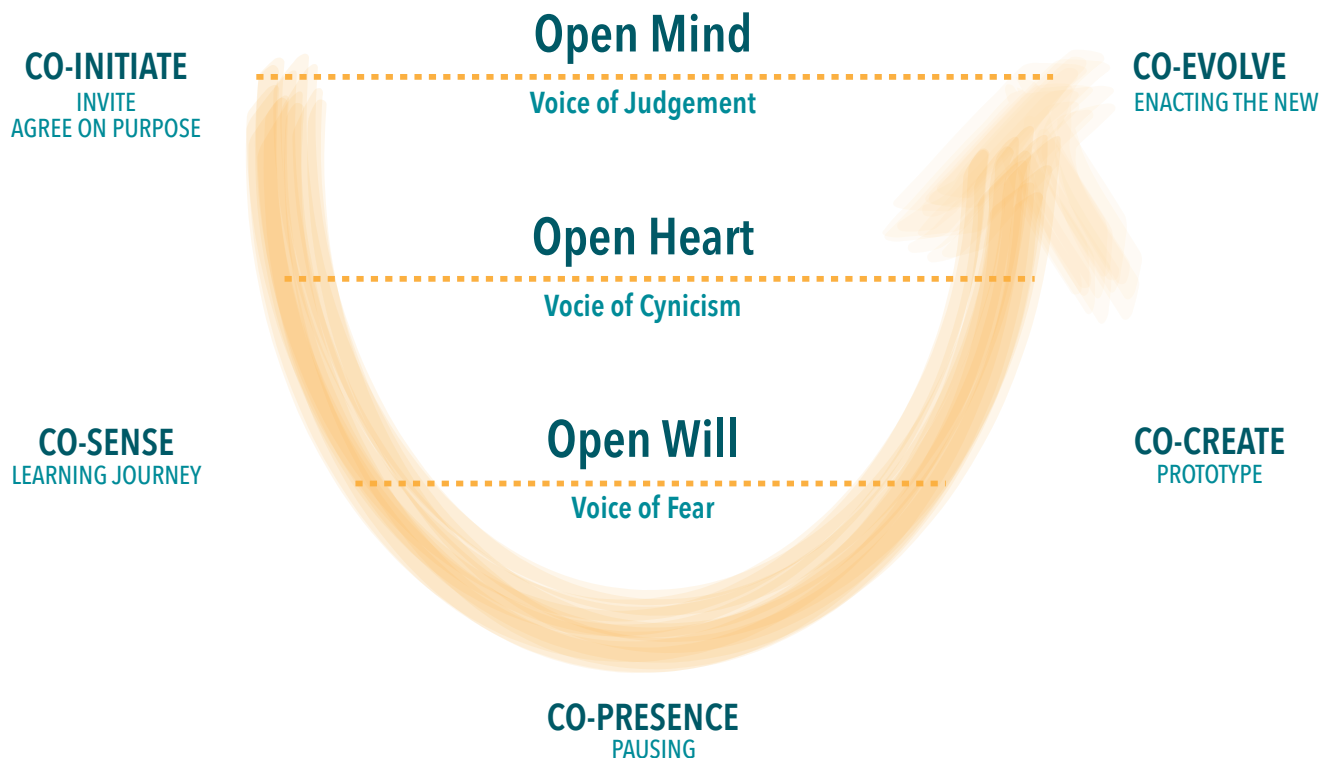
1. Energy follows attention.
Wherever you place your attention, that is where the energy of the system will go. "Energy follows attention" means that we need to shift our attention from what we are trying to avoid to what we want to bring into reality.

2. Follow the three movements of the U.
We refer to this as the U process because of the "shape" of the journey. In order to get to the deep point of transformation (at the bottom of the U) it is necessary first to "go down the U" (the left-hand side) by opening our minds, hearts, and will, and then, after "passing through the eye of the needle" at the bottom, "go up the U" (the right-hand side) to bring the new into reality (see figure 5). In the words of our colleague, economist Brian Arthur, the three main movements of the U process are:

- **Going down the U:** "Observe, observe, observe." Stop downloading and totally immerse yourself in the places of most potential, in the places that matter most to the situation you are dealing with.

- **At the bottom of the U:** "Retreat and reflect, allow the inner knowing to emerge." Go to the places of stillness where knowing comes to the surface. Here you share and reflect on everything that you have learned from a deep place of listening, asking, "What wants to emerge here?" and "How does that relate to the journey forward?" So the key question is: how can we become part of the story of the future rather than holding on to the story of the past?

THEORY U

Open Mind
Voice of Judgement

Open Heart
Vocie of Cynicism

CO-SENSE
LEARNING JOURNEY

CO-CREATE
PROTOTYPE

Open Will
Voice of Fear

CO-PRESENCE
PAUSING

- **Going up the U:** "Act in an instant." Explore the future by doing. Develop a prototype. A prototype explores the future by doing something small, speedy, and spontaneous; it quickly generates feedback from all the key stakeholders and allows you to evolve and iterate your idea.

3. GO TO THE EDGES OF THE SELF. To apply this process in the context of institutions, we have to power it with a new leadership technology. The core of this new leadership technology focuses on tuning three instruments: the open mind, the open heart, and the open will. With an open mind we can suspend old habits of thought. With an open heart we can empathize, see a situation through the eyes of someone else. With an open will we can let go and let [the new] come.

4. PASS THROUGH THE EYE OF THE NEEDLE. At the deepest point of each U journey is a threshold. Crossing that threshold, passing through the eye of the needle, can feel like dying and being reborn. The phrase "eye of the needle" refers to a gate in ancient Jerusalem, where, according to the Bible, "it is easier for a camel to go through the eye of a needle than for a rich man to enter the kingdom of God." For a man to fit his camel through Jerusalem's gate, he has to remove all the bags from the camel's back. Likewise, if we want to go through the eye of the needle at the bottom of the U, we have to let go of everything and offload all the baggage that isn't essential. Going through that gate means encountering the two root questions of our journey: Who is my Self? and What is my Work? The capital "S" Self is my highest future possibility. The capital "W" Work is my sense of purpose or calling. It's what I am here on this earth to do.

5. Transform the three enemies. Why is the U journey the road less traveled? Why is it that most people are aware of this deeper process of knowing and yet it rarely happens in the context of our larger systems? Because the moment we commit ourselves to going on this journey we start to encounter our three principal enemies: the voice of judgment (VoJ: shutting down the open mind), the voice of cynicism (VoC: shutting down the open heart), and the voice of fear (VoF: shutting down the open will).

6. Always start by "attending to the crack." Where do we meet the future first? "Seek it with your hands, don't think about it, feel it" is the essential instruction that Bagger Vance gives to Junah in the Robert Redford movie Bagger Vance. The future shows up first in our feelings and through our hands, not in our abstract analysis. "Attend to the crack" means attend to the openings, the challenges, and the disruptions where you feel the past ending, and the future wanting to begin.

7. Transform the fields of conversation from downloading and debate to dialogue and collective creativity. Each social field needs a container. Higher-level conversation like dialogue and collective creativity require higher-quality containers and holding spaces. "Transforming the quality of conversation" in a system means to transform the quality of relationship and thought—that is, the quality of tomorrow's results.

8. Strengthen the sources of presencing in order to avoid the destructive dynamics of absencing. Modern society emerges from the interplay of two powerful social fields: presencing and absencing. The field of presencing works through the opening of the mind, the heart, and the will. We know that there are many empirical examples of this process. But everyone who works in institutions and systems

also knows that there is another field out there. That field is characterized by getting stuck with the idea that there is only One Truth rather than operating with an open mind, by getting stuck in One Us vs. Them rather than operating from an open heart, and by being frozen inside one rigid identity rather than operating from an open will.

What do we call social systems that have these three characteristics? Fundamentalist. Fundamentalism is the result of closing down and freezing your mind, heart, and will — as opposed to opening, warming, and illuminating them.

We live in the tension of these two fields. We are not one, but two. Sometimes we operate from our highest future possibility (presencing). But every now and then we lose it and get stuck in old patterns of downloading (absencing). We experience this fragile nature of current reality not only in personal relationships, but also on the field of global development and change. We are torn between these two fields, and we need to learn how to strengthen our grounding in the field of presencing.

Source:
https://www.presencing.com/node/109

https://www.presencing.com/principles

www.ottoscharmer.com

www.presencing.org

We are longing for profound renewal and change in our collective structures and institutions. We have been waiting, consciously or not, all our lives. And now, it seems, a window is beginning to open.

Otto Scharmer

The Basics of a Learning Lab

Addressing emergent issues in an unknown future

Chris Corrigan with material from from **Gina Rembe, Chelsea Robinson & Ingrid Burkett**
www.social-labs.com/social-labs-revolution-a-masterclass-in-new-zealand

Learning Labs are processes that were developed to bring new ways of addressing emergent issues in an unknown future. For most of human history, communities of human beings worked together to discern what was going to happen, to learn from their past experience and to try new things as experiments as a way to learn about their emerging futures.

It has only been in the last few centuries, with the rise of the scientific modernism, when we have started planning as if we can predict the future. In modern organizational and community life, we adopted this traditional process into predictive planning, which is predicated on an assumption that we can know what the future will hold and, given the right steps, we can work towards realizing that future. This kind of predictive planning usually starts with a group identifying it's preferred future and then making choices about what kind of actions will take it there. This has good application in contexts where the future state can be known with some certainty and where the group has the resources to achieve their targets and influence the system.

But what about contexts where the future is uncertain and where the group is simply one of many participating in system wide change? In these kinds of contexts, change is not predictive but adaptive and emergent. We cannot know the future, but we can work together to create new ways of doing things that will help us understand how to address emerging shifts in systems we have taken for granted.

In many aspects of society, including community life, surprising changes are rarely initiated from the institutions that are right at the core of the work. Instead, social sectors change from the margins, from the outside and in emergent and surprising ways. Predictive planning models are limited in their ability to address these kinds of changes, because they largely focus on the

knowable, and they often miss the emergent. They are useful in providing certainty and stability in limited contexts, but they can often create blind spots because we focus on what we are trying to do and not what the surrounding context is doing. Taken to extremes organizations that rely heavily and exclusively on predictive planning models will survive for a while but often come apart quickly and catastrophically, as the world changes around them. Almost every organization, business and enterprise of significance also uses adaptive processes in its operations. Community organizations that don't are at risk from rapidly changing environments.

Learning Labs were developed to explicitly work with the emergent and adaptive edges of change. As a result, participating in a Learning Lab is very different from participating in a traditional strategic planning process.

First, the process is about learning rather than knowing, which means that we are required to engage in the very difficult task of suspending our ideas about how things SHOULD be and instead begin to look in an open way about how things ARE. We do this through a process of co-sensing, largely built on intentional exploratory dialogues. It is our job first of all to set down our assumptions or desires about the future of our work and instead go to the edges of our experience and learn about what is emerging. We look to experts not to tell us what to do but to inspire our own thinking. Instead of analyzing our findings and producing recommendations, we work together to make sense of our findings and identify patterns.

Going on a learning journey has the purpose of increasing the intelligence and resourcefulness of a system, so that it is better able to deal with and understand the emergent phenomena that buffet it. As we initiate this learning journey together we are also initiating a process of building capacity in the community foundations sector to understand the changes we will be facing. Our goal here is not to plan for the future we want, but to listen for the weak signals of the future that is coming.

Second, a Learning Lab results in prototypes, not plans. Again, this is very different from a predictive planning process where the plan dictates the action. In this case the action dictates the plans. We will be creating together prototypes that, when we enact them with a level of minimal viability, will teach us more about how to address the kinds of changes that we will be facing. The process is intended to help the sector co-create new safe-to-fail prototypes. When we discover together things that work we can amplify and co-evolve them, so that they have a better chance of going to scale and becoming a part of the way community foundations will do their work in the future.

The Energy & Shape of the Lab Team's work

Observing & Sensing ~ What's really going on?

The first phase is based around Sensing – experiencing the problem and learning all about it, both from a desk-research point of view as well as by immersing the cohort in the problem out in the field. The group needs to be split up and sent out into the world to be alongside people who have different perspectives on how the complex issues are playing out in real peoples' lives. Given the gravity of any complex wicked issue, this eventually results in a 'it isn't possible to do anything about it, the problem is just too large' feeling amongst the Lab team.

In order for this phase to be successful, there is capacity building needed for the Lab team to appreciate how to gather data in an effective and insight-focused way. Using Ethnographic approaches as well as community research approaches, the team gets up-skilled in interview, observational and other data gathering techniques.

The Lab team is also diverse. People within the team learn from one another as much as they learn from the external world through the process of making sense of all the information together, and seeing it from one another's perspectives. The length of this phase is between 6 and 7 weeks long.

Reflection & Retreat ~
What do we make of all of this?

Just when it all feels too big and the team hits saturation, the Lab kicks into its second phase, which is more reflective and internally-focused.

The Lab conveners provide a deep space for reflection, again both conceptually and physically, by taking the cohort to a remote location, for example a retreat centre, in a natural setting. This is a residential space in which the Lab team focuses together for a week.

Following a few days of sharing the experiences, stories, data and insights from time in the field, the individuals retreat to three days of isolated time to reflect. The focusing question of the gathering is "Based on what you've seen and heard, what do you feel called to work on?". This isolation could be in tents, separate and in solitude, yet in proximity, of one another for safety and ease of logistical support in terms of food and checking in with the Conveners.

At the close of this residential time, the group re-gathers to discuss what personal realisations, ideas and commitments are coming up for each person. What are you called to do, for who? What ideas do you have about beginning to take action in that space? How will you know it's creating value? With these emerging crystals of insight, the Lab begins to prototype.

Protoyping ~
Let's try our most promising ideas

Kicking into the next phase of Protoyping is a time to work out the synergies between different individuals to form teams around different approaches. People may want to work on the same problem but form very different perspectives or angles so it's important to allow space for teams to negotiate their shared understanding of the approaches they want to take together.

Half the length of the lab time is spent prototyping, so let's say in this case if sensing is 6 weeks long, reflection is 3 weeks then prototyping might be 9 weeks.

The prototyping phase is about iteration, fast trials, getting quickly from concept to testing, and not being precious about ideas that fail. Zaid said "Ask a scientist about hypotheses he has let go of in order to know how good a scientist he is", and suggests that it is essential for the lab teams to hold their ideas lightly so they can test properly. Objectively discarding failed test ideas is the way we improve the likelihood that the lab will create interventions with impact.

There are no cheap tickets to mastery. You have to work at it, whether that means rigorously analyzing a system or rigorously casting off your own paradigms and throwing yourself into the humility of Not Knowing. In the end, it seems that that power has less to do with pushing leverage points than it does with strategically, profoundly, madly letting go.

Donella Meadows

Organizational Patterns

Throughout human history the living system of human organization has created many ways of organizing itself to get work done. We notice that these ways of working together can be captured within four organizational paradigms. Each of these paradigms is alive and familiar to us, and each has its strengths and weaknesses. When we are designing process, projects and organizations, it is worth paying attention to the different roles of these paradigms so that they can be used wisely.

CIRCLE – Our oldest organizational form. In a circle, people come together equally to provide a multiplicity of perspectives on something. Circles are powerful for reflection, for harnessing collective insight and for making decisions. To work, people in circles need to have equal access to information, power and responsibility.

HIERARCHY (THE TRIANGLE) – Hierarchy is another ancient form. When things need to get done and someone has more responsibility than others, hierarchy is an efficient way to channel action. In a small and dynamic hierarchy, a leader is assisted by helpers. The helpers don't need to have the same information as the leader in order to do the work.

BUREAUCRACY – Despite its bad rap, the gift of the bureaucracy is that is can bring stability and efficient ways of distributing resources. Bureaucracies that work well act like irrigation systems, ensuring that all parts of an organization are "watered" and that resources don't flow too fast. To slow down the flow, bureaucracies retain accountabilities from the bottom to the top in exchange for a flow of resources from the top down. This form, used wisely, is a brilliant adaptation of the way energy flows in a natural system.

NETWORK – Networks are formed by actors who actively choose to be in relationships with others. Actors are autonomous and only engage in relationships that mutually serve partners. Networks are incredibly fast ways to organize complexity. In nature the network is the prevalent form of sustainability. Increasingly, human networks are becoming the prevalent form of organizing on the planet led and abetted by the internet. Networks thrive when sharing and reciprocity is present. Huge amounts of work can get done very efficiently by networks, because actors can find exactly the partners they need for any given time.
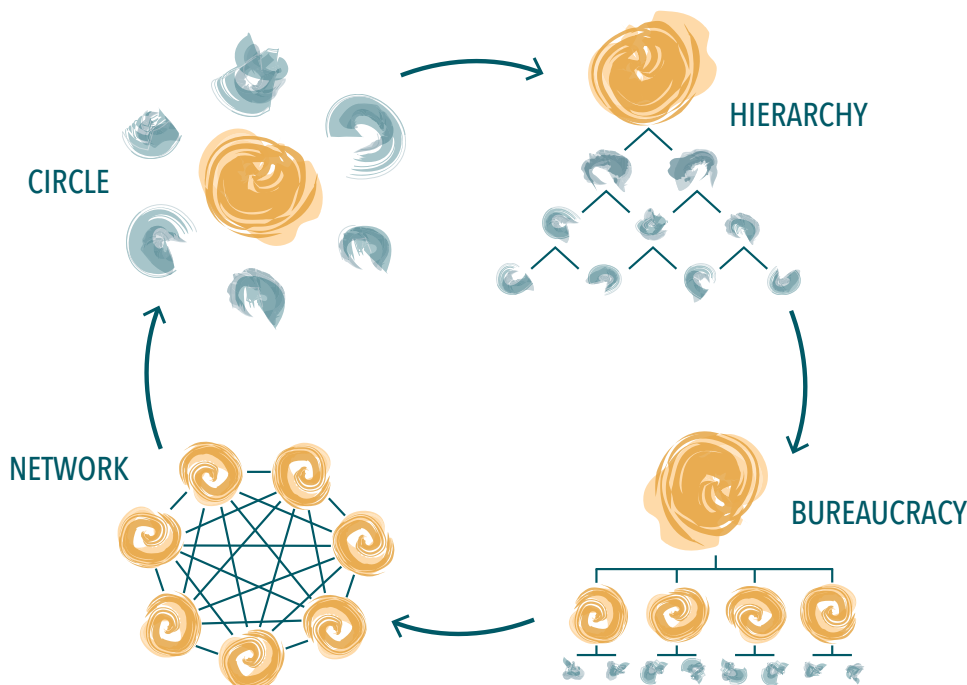
THE FIFTH PARADIGM – What could the next paradigm in human systems be? How will we integrate these four systems in a post-networked world? As we work with each of these four paradigms, we get hints about what it might be like to work at the next stage of human evolution.

CIRCLE

HIERARCHY

NETWORK

BUREAUCRACY

The Fifth Paradigm

The fifth organizational pattern is a combination of the circle or council for collective clarity, the triangle or project team (hierarchy) for action and the square or bureaucracy for accountability, structure, and stability and the network for rapid sharing of information, inspiration and linking all the parts together.

At the centre, always, is our purpose. Typically, a core team will gather in a circle around a purpose, which will be based on meeting a need that is felt in our life contexts. As we gather around the core purpose, we begin to form relationships with others in the circle that, as we map the connections, start to show up as a network. But while these relationships can help us all with our individual work, they do not necessarily allow us to manifests our shared purpose in the world, which will typically involve making things happen. The first step might be to develop actions to sustain the core team. So individual members take responsibility for different aspects – like organizing meetings or raising funds - other members step up in a support role and this leads to the formation of triangles. The triangles will be dictated by the central purpose. Hierarchy forms in response to central purpose – not somebody's ego!

Once the core team is sustainable, the next step is typically to open up the conversation to the wider community that feels the need that informs the purpose at the centre of our circle. A triangle from the core team might then get together to call a larger-scale assembly, which might become a circle of supporters for the larger project. The inner circle is reaching out to the next level, which will in turn reach out to a wider community, creating concentric circles rippling out into our society, each circle connected to the others by triangles animating action informed by the core purpose.

The pattern of core purpose, circles, triangles and networks repeats again and again. Another typical finding is that as the core team goes out into the community and the conversation expands, the core purpose is informed by a broader perspective and is adjusted accordingly, to accommodate the next level of scale and action.

It is important to understand that what we are describing here is not a deliberately designed model, but the description of a pattern that has emerged naturally and spontaneously throughout the global hosting community as we have collectively developed our work of hosting in ever-larger and more complex adaptive systems.

Then perhaps we would discover that 'organisational miracles' are always happening, and have always been happening.

Mario Tronti

Networks and Complex Problems

How does a network work? Where is "purpose" in a network? Does a network achieve anything intentionally?

Networks can be vehicles for motivating people to act and mobilizing collective action on a large scale because activity can spread quickly without being routed through a central authority. By creating infrastructure that enables people to connect with one another and with new opportunities, networks can catalyze widespread engagement.

Networks are about independent agents pursuing their own good ideas, but staying connected. The emphasis for action is on folks trying things out and bringing their results to learn and teach each other. The leadership role is simply to hold space, connect, support the learning. It's not a good organizational structure if you want to achieve a concrete goal. It's brilliant for getting a million things done all at once.

If a group is coming together to work on a specific task that has a definite completion, then yes, you need unity of purpose and a common goal. You need to exclude distractions and leadership is about getting the resources and making it happen.

When people convene networks, they need to convene a rim, inside which the agents in the network can find each other. As in Open Space, we trust that the centre rests with each individual who takes action, succeeds and fails on her own merits. Networks form around principles, not rules.

When working as a network, it is about action that is self-organizing and connected, not centrally determined. We don't need a collective decision on which initiatives to proceed with (e.g. we don't vote on which initiatives to proceed with). What we need instead is a lot of various connected action that is "posted and hosted" and undertaken by invitation.

This is valuable because it allows for actions to come from the margins without the need for a whole group to be involved or to collectively decide. And we have clarity on what different people and sub-groups are doing – we make visible the web of autonomous, connected action.

So it doesn't make sense to make a network do one thing. It would be like forcing a market to produce only a Volvo. You would lose the chance to produce Hondas and apples and typewriters and craft beer and rimless spectacles. But if the organization you are running is not a network, don't call it a network, and choose the single piece of work you are all committed to doing. Then you are a team.

Complicated problems benefit from a clear purpose and a single-minded team working together to make it happen. Complex problems require millions of little solutions and some sense-making and pattern finding to discern what the heck is going on and where the system has an inclination to evolve. When we sense that, we can do a million things that take us that way.

Perhaps you have a goal: healthy water for all. But what's the point of that as a goal? You can't achieve it alone. You don't have the power. It's a waste of time to get everyone to agree on a goal that is an emergent outcome of a complex system. Instead, the "goal" should be a guiding star for the work. Let's do things that take us in that direction. How will we know we're heading in that direction? Choose a few simple metrics and apply them to a million experiments and support the ones that make the numbers go the right way.

For an additional resource on networks, see:
http://www.monitorinstitute.com/downloads/what-we-think/catalyzing-networks/Catalyzing_Networks_for_Social_Change.pdf

METHODS

Core Methods for Strategic Conversation

The following pages will give a short introduction to some of the methodologies that are good practice in participatory leadership. They are designed to engage a group of people (large or small) in strategic conversations, where our collective wisdom and intelligence can be engaged in service of finding the best solutions for a common purpose.

There are some **basic principles or qualities** that are common to all these methodologies, e.g.

- They offer a **simple structure** that helps to engage small or large groups in conversations that can lead to results.

- They each have their **special advantages and limitations.**

- They are **based on dialogue**, with **intentional speaking** (speaking when you really have something to say) and **attentive listening** (listening to understand) as **basic practices**, allowing us to go on an exploration and discovery together, rather than trying to convince each other of our own present truths.

- **Suspending assumptions** is a basic practice. It allows us to listen without bias (or with less bias) and to examine our own present truths.

- **Circle is the basic organizational form**, whether used as the only form (e.g. circle practice) or used as many smaller conversations circles, woven into a bigger conversations, (e.g.

World Cafe, Open Space).

- Meeting in a circle is a **meeting that welcomes all voices**. Generally all these methodologies inspire peer-to-peer discovery and learning.

- **Inquiry or powerful questions are a driving force.** Answers tend to close a conversation, while inquiry keeps the conversation going deeper.

- The purpose of all this is to "think well together", that is, to **engage the collective intelligence for better solutions.**

- **Facilitating** these engagements or conversations is more like stewarding or **"hosting",** allowing the solutions to emerge from the wisdom in the middle. Hosting well requires a certain proficiency in the four-fold practice of: being present in the moment to what is happening, engaging in conversations with others, hosting conversations and co-creating or co-hosting with others.

- There are a number of **conditions** that need to be in place for engagement to work well. Any engagement or strategic conversation needs to be based on a **real need** and has to have a **clear purpose**. Any **"givens" or boundary conditions** need to be clear ahead of time. You may also have defined success-criteria or have an idea of the outcome - - even if the concrete **solutions will emerge from the conversations.**

The Circle Way
Practicing an ancient form

The Circle Way is an alternative infrastructure for collaborative conversations that calls on long-held principles and practices of circle. As Christina Baldwin describes, circle has come back to take us forward. Circle is a foundational practice that is embedded in other group dialogue methodologies. If people can learn circle practice, it is easier to take other facilitation practices to a deeper level.

- Circle is a shape where everyone can see and hear each other.

- Circle is a group process that supports every voice into collaborative decision-making.

- Circle is an experience of sharing story, inviting diverse thinking, and encouraging creative problem solving.

One of the beautiful things about circle is its adaptability to a variety of groups, issues and timeframes. It is a chance for people to stop, to sit down, and to listen to each other. Circle can be the process used for the duration of a gathering, particularly if the group is relatively small and time for deep reflection is a primary aim. Circle can also be used as a means for "checking in" and "checking out" or a way of making decisions together.

Circle can be used to build relationship, to have difficult conversations and make difficult decisions, and to help a community through transitions. It can be used for a couple or family or a company of hundreds. Wherever people need or want to gather for conversation, circle practice invites meaningful dialogue.

What transforms a meeting into a circle is the willingness of people to shift from informal socializing or opinionated discussion into a receptive attitude of thoughtful speaking and deep listening.

Components of Circle

THREE PRINCIPLES

- Leadership rotates among all circle members
- Responsibility is shared for the quality of experience
- Reliance is on wholeness, rather than on any personal agenda

THREE PRACTICES

- Speak with intention: noting what has relevance to the conversation in the moment
- Listen with attention: respectful of the learning process for all members of the group
- Tend to the well-being of the circle: remaining aware of the impact of our contributions

SETTING CIRCLE AGREEMENTS

The use of agreements allows all members to have a free and profound exchange, to respect a diversity of views, and to share responsibility for the well-being and direction of the group. Agreements often used include:

- We hold all stories or personal material in confidentiality
- We listen to each other with compassion and curiosity
- We ask for what we need and offer what we can
- We agree to employ a group guardian to watch our need, timing and energy. We agree to pause at a signal when we feel the need to pause

INTENTION

Intention shapes the circle and determines who will come, how long the circle will meet, and what kinds of outcomes are to be expected. The caller of the circle spends time articulating intention and invitation

Start-Point or Welcome

Once people have gathered, it is helpful for the host, or a volunteer participant, to begin the circle with a gesture that shifts people's attention from social space to council space. This gesture of welcome may be a moment of silence, reading a poem, or listening to a song – whatever invites centering.

Setting the Centre

The center of a circle is like the hub of a wheel: all energies pass through it, and it holds the rim together. To help people remember how the hub helps the group, the center of a circle usually holds objects that represent the intention of the circle. Any symbol that fits this purpose or adds beauty will serve: flowers, a bowl or basket, a candle.

Check-In/Greeting

Check-in helps people into a frame of mind for council and reminds everyone of their commitment to the expressed intention. It insures that people are truly present. Verbal sharing, especially a brief story, weaves the interpersonal net.

Check-in usually starts with a volunteer and proceeds around the circle. If an individual is not ready to speak, the turn is passed and another opportunity is offered after others have spoken. Sometimes people place individual objects in the center as a way of signifying their presence and relationship to the intention.

Guardian

The single most important tool for aiding self-governance and bringing circle back to intention is the role of guardian. One circle member volunteers to watch and safeguard group energy and observe the circle's process. The guardian usually employs a gentle noise-maker, such as a chime, bell, or rattle, that signals to everyone to stop action, take a breath, rest in a space of silence. The guardian makes this signal again and speaks to why s/he called the pause. Any member may call for a pause.

Forms of Council

- Talking piece council is often used as a part of check-in, check-out and whenever there is a desire to slow down the conversation, collect all voices and contributions, and be able to speak without interruption.

- Conversation council is often used when reaction, interaction and an interjection of new ideas, thoughts and opinions are needed.

- Reflection, or silent council gives each member time and space to reflect on what is occurring, or needs to occur, in the course of a meeting. Silence may be called so that each person can consider the role or impact they are having on the group, or to help the group realign with their intention, or to sit with a question until there is clarity.

Check-Out and Farewell

At the close of a circle meeting, it is important to allow a few minutes for each person to comment on what they learned, or what stays in their heart and mind as they leave. Closing the circle by checking out provides a formal end to the meeting, a chance for members to reflect on what has transpired, and to pick up objects if they have placed something in the center.

As people shift from council space to social space or private time, they release each other from the intensity of attention being in circle requires. Often after check-out, the host, guardian, or a volunteer will offer a few inspirational words of farewell, or signal a few seconds of silence before the circle is released.

Our deepest belief has been that careful dialogue, with a question or intention in the center, agreements for speaking and listening at the rim, and a light social structure for leadership can change how people work, live, and govern themselves.

Christina Baldwin & Ann Linnea

This is adapted from a gift from The Circle Way, a loosely connected global circle of colleagues who practice, consult, and teach The Circle Way (originally mentored and guided by Ann Linnea and Christina Baldwin of PeerSpirit Inc.) www.thecircleway.net

The World Café
Dialogue for large and small groups

The World Café is a method for creating a living network of collaborative dialogue around questions that matter in real life situations. It is a provocative metaphor…as we create our lives, our organizations, and our communities, we are, in effect, moving among 'table conversations' at the World Café. (From World Café Resource Guide)

What is World Café Good For?

A World Café is a great way of fostering interaction and dialogue with both large and small groups. It is particularly effective in surfacing the collective wisdom of large groups of diverse people. The café format is very flexible and adapts to many different purposes – information sharing, relationship building, deep reflection exploration and action planning.

When planning a café, make sure to leave ample time for both moving through the rounds of questions (likely to take longer than you think!) and some type of whole-group harvest.

Operating Principles of World Cafe:

- Create hospitable space
- Explore questions that matter
- Encourage each person's contribution
- Connect diverse people and ideas
- Listen together for patterns, insights and deeper questions
- Make collective knowledge visible

Assumptions of World Cafe:

- The knowledge and wisdom we need is present and accessible.

- Collective insight evolves from honoring unique contributions; connecting ideas; listening into the middle; noticing deeper themes and questions.
- The intelligence emerges as the system connects to itself in diverse and creative ways.

General Flow of a World Café:

- Seat 4-5 people at café-style tables or in conversation clusters.
- Set up progressive rounds of conversation, usually of 20-30 minutes each – have some good questions!
- Ask one person to stay at the table as a "host" and invite the others to move to other tables as ambassadors of ideas and insights
- Ask the table host to share key insights, questions, and ideas briefly to new table members, and then let folks move through the rounds of questions.
- After you've moved through the rounds, allow some time for a whole-group harvest of the conversations.

Materials Needed:

- Small tables (36-42"), preferably round
- Chairs for participants and presenters
- Tablecloths and flip chart paper for the tables
- Markers
- Flip chart or large butcher paper for harvesting collective knowledge or insights
- Posters/Table Tents of Café Etiquette
- Materials for harvest

Adapted from Café to Go at: www.theworldcafe.com

Open Space Technology
Participants call the conversation

The goal of an Open Space Technology meeting is to create time and space for people to engage deeply and creatively around issues of concern to them. The agenda is set by people with the power and desire to see it through, and typically, Open Space meetings result in transformative experiences for the individuals and groups involved. It is a simple and powerful way to catalyze effective working conversations and truly inviting organizations – to thrive in times of swirling change. www.openspaceworld.org

What is Open Space Good For?

Open Space Technology is useful in almost any context, including strategic direction setting, envisioning the future, conflict resolution, morale building, consultation with stakeholders, community planning, collaboration and deep learning about issues and perspectives. Open Space Technology is an excellent meeting format for any situation in which there is:

- A real issue of concern
- Diversity of players
- Complexity of elements
- Presence of passion (including conflict)
- A need for a quick decision

Open space can be used in groups of 10 to 1,000 – and probably larger. It's important to give enough time and space for several sessions to occur. The outcomes can be dramatic when a group is uses its passion and responsibility – and is given the time – to make something happen.

PRINCIPLES OF OPEN SPACE

- Whoever comes are the right people
- Whenever it starts is the right time
- Whatever happens is the only thing that could have
- When its over its over

ROLES IN OPEN SPACE

- **Host** - announces and convenes a conversation
- **Participant** - participates in a conversation
- **Bumble bee** - moves between conversations, cross-pollinating ideas
- **Butterfly** - takes time out to reflect

OPEN SPACE

MARKETPLACE

The Law of Two Feet

The Four Principles

1. Whoever comes is the right people.
2. Whatever happens is the only thing that could have happened.
3. Whenever it starts is the right time.
4. When it is over it is over.

The Law of Mobility

If you find yourself in a situation where you are not contributing or learning, move somewhere were you can.

The four principles and the law work to create a powerful event motivated by the passion and bounded by the responsibility of the participants.

General Flow of an Open Space Meeting:

The group convenes in a circle and is welcomed by the sponsor. The facilitator provides an overview of the process and explains how it works. The facilitator invites people with issues of concern to come into the circle, write the issue on a piece of paper and announce it to the group.

These people are "conveners." The convener places their paper on the wall and chooses a time and a place to meet. This process continues until there are no more agenda items.

The group then breaks up and heads to the agenda wall, by now covered with a variety of sessions. Participants take note of the time and place for sessions they want to be involved in.

Dialogue sessions convene for the balance of the meeting. Recorders determined by each group capture the important points and post the reports on the news wall. All of these reports will be

harvested in some way and returned to the larger group.

Following a closing or a break, the group might move into convergence, a process that takes the issues that have been discussed and attaches action plans to them to "get them out of the room."

The group then finishes the meeting with a closing circle where people are invited to share comments, insights, and commitments arising from the process.

Materials Needed:

- Circle of chairs for participants
- Letters or numbers around the room to indicate meeting locations
- A blank wall that will become the agenda
- A news wall for recording and posting the results of the dialogue sessions
- Breakout spaces for meetings
- Paper on which to write session topics/questions
- Markers/Pencils/Pens
- Posters of the Principles, Law of Two Feet, and Roles (optional)
- Materials for harvest

Pro Action Café
Combining World Café and Open Space

The Pro Action Cafe is a space for creative and action oriented conversation where participants are invited to bring their call - project - ideas - questions or whatever they feel called by and need help to manifest in the world.

The concept of Pro Action Cafe is a blend of World Café and Open Space Technology. It was first conceived by Rainer von Leoprechting and Ria Baeck in Brussels, Belgium.

What is Pro Action Cafe Good For?

As a conversational process, the Pro Action Cafe is a collective, innovative methodology for hosting conversations about calls, questions, and projects that matter to the people that attend. These conversations link and build on each other as people move between cafe tables, cross-pollinate ideas and offer each other new insights into the questions or issues that are most important in their life, work, organization, or community.

As a process, the Pro Action Cafe can evoke and make visible the collective intelligence of any group, thus increasing people's capacity for effective action in pursuit of good work. Pro Action Cafe can be used with a network of people and/or as a methodology for a specific, group, organization, or community to engage in creative and inspirational conversation leading to wiser and more collectively informed action.

The real voyage of discovery lies not in seeking new landscapes, but in seeing with new eyes.

Marcel Proust

GENERAL FLOW OF A PRO ACTION CAFÉ

A quick check in circle to connect to purpose of the session and with each other. If check-in has already taken place as part of a longer process go straight to building the agenda.

You need 2 1/2 to 3 hours for a good Pro Action Cafe. Invite participants to step forward with their call and in that way ask the community for the help you need to move your project into action. People with a call/project stand up, speak it and write it on the agenda that corresponds to a numbered cafe table.

Count the amount of participants, divide by four - this gives you the amount of callers with projects/sessions that can be worked. (i.e. with 40 participants, you can have 10 callers maximum) The principle is first come, first served. If you have less callers, add chairs to cafe tables but no more than 5 at a table. During this process each contributing participant (those who do not step forward) get to support up to three different calls/projects.

When the agenda has been created, invite the callers to go to their numbered cafe tables. There will be three rounds of conversation in cafe style of 20-30 minutes - each guided by a few generic questions to help deepen and focus the conversations.

Round 1

What is the quest behind the call/question/ project? - to deepen the purpose of the call

Round 2

What is missing? - when the quest has been deepened, explore what could make the project more complete and possible

Round 3

What am I learning about myself? What am I learning about my project? What next steps will I take? What help do I still need? - to help bring it all together for the caller and their project

Round 3 is in 2 steps:

- First 20-25 minutes for the callers to reflect by themselves on the 4 questions above and harvest their key insights.

- Round proceeds as the previous rounds - in conversation with participants. The new participants visit the table to listen to the harvest of the caller, their learning, their steps, help needed - and then offer any insight and any further support they can offer.

Between each round, crate breaks for the participants to have a drink, relax together, and get ready to support another caller in their quest/ project.

See more:
https://sites.google.com/a/pro-action.eu/pro-action-caf-/how-to-become-a-host/hosting-kit

LAST STEP is to meet in circle and invite the callers from each table to share answers to these two questions:

1. **What am I grateful for?**

2. **What are my next steps?**

If there is time, the whole group can shortly reflect on: What applications do we see for practicing Pro Action café in our contexts?

End the Pro Action Café with a collective gesture to appreciate the work done and the gifts offered and received.

MATERIALS AND SET UP

- Ideally create a large circle in one part of the room and enough cafe tables with four chairs in another part. (If the size of the room does not allow this, then participants will move the tales and chairs themselves as soon as the agenda is created.)

- Dress the tables with flipchart paper, colored pens, and markers as basic cafe set up.

- Prepare the matrix for the agenda setting of the session with the right amount of sessions according to the number of participants divided by four.

- Have fun and do good work together.

Collective Story Harvest
Surfacing insights dwelling beneath our stories

Storytelling is one of our oldest 'knowledge management' tools, and still one of the most effective. Our stories contain both the experience and learning that can increase our capacity to function in complex contexts.

Collective story harvesting is a process born out of the Art of Hosting practice, developed and stewarded by Mary-Alice Arthur. It is a process that invites the active involvement of all present: the story holders tell the story, and the members of the audience listen actively from the perspective of a specific question or focus. This allows us to track many threads or aspects of a single story simultaneously. It allows us to practice targeted listening, group learning and collective meaning making, as well as offering a tremendous gift to the story holder. Group harvesting is an ideal way to surface the many insights and innovations that dwell beneath the surface of our stories, using the wealth of diverse perspectives present in any group to enrich the experience and understanding of the group as a whole.

When to use collective story harvesting

Collective story harvesting is extremely useful at the convergence of any phase in the life of a project, to take stock of learning so far. Having outside ears listen to a story can help to surface things that hadn't seen or noticed during the experience. It can also support a story to rise above the personal to reveal insights about the local context it happened in and even the wider systemic context.

How does group harvesting of practice stories work?

First, you need a good story about a change process that was run using Art of Hosting principles and practice – ideally one that has enough complexity, scale and duration to make it interesting. In our Art of Hosting community,

we have the stories of the European Commission, healthcare projects in Columbus, Ohio and Nova Scotia, the UK FinanceLab and Annecto in Melbourne, Australia as some key examples of this type of story, but any systemic story will do.

It is best to have those directly connected to the story on hand to tell it, and it can be more interesting to hear from more than one person involved in the story. More voices add depth and richness, as well as a variety of points of view.

The story does not need to be an often-told one, or polished in any form. In fact, this process can be used to help polish a story and give the storytellers input on how to focus and refine the story to be told to different audiences.

We've found that group harvesting takes time – at least 90 minutes is the minimum time needed. If you are working with a group of harvesters during a training, or with people who haven't done this type of process before, then keeping the storytelling to around 30 minutes is advisable, otherwise it is easy for listeners to become overloaded. If you are working with a practice team or your purpose is to create maximum learning around a story, then you may want to work on the interplay between story, harvest and learning for a half day, a day or even longer.

Preparing for group harvesting:

First check with your storytellers and make them an invitation. Stories respond to invitation and when a heartfelt invitation is present, often a story will come out in a whole new way and offer new learning to those telling it. A group harvest is a gift to those telling and those harvesting, and should be offered as such.

Next, decide on the arcs you would like to harvest. Ideally this could be agreed with the storyholders and the listeners, depending on where they want

to focus their learning. As in any Art of Hosting process, you are planning for the harvest. Take as much time as you need to discuss exactly what you want to get out of this process and what will happen to the harvest after. You'll need at least one person harvesting each arch you've chosen and more than one can harvest the same arch simultaneously. Here are some to choose from:

- Narrative Arc*: The thread of the story – people, events, stages. You might also harvest facts, emotions and values that are part of the story, etc.

- Process Arc*: What interventions, processes, applications, discoveries happened?

- Pivotal Points*: When did breakthroughs occur, what did we learn?

- Application: What can we learn from this story for application in our own or other systems?

- Taking Change to Scale: What can we learn from this story about taking change to scale?

- Questions: What questions arise from this story that we could ask of any system?

- Synchronicity & Magic: What happened during this story that pointed to synchronicity and the magic in the middle?

- Specific theme: Harvest the story using a specific theme, like collaborative leadership, the art of participation, etc, and see what it tells you

- Art of Hosting pattern arc: The 6 Breaths: Where did each breath occur during the story? The 5th organisational paradigm: Where did new forms of governance and working occur? Core team/calling team: What did we learn about holding the centre of this work? There may be others as well.

- Principles: What principles of working can be gleaned from this story? What did we learn about participatory practices? What principles of complex living systems were reflected in this work?

- The StoryField*: How did the field of the system's story change? Can you name the story or metaphor the system started with and what it moved to?

*We are suggesting that the arcs marked with * might be foundational to any harvesting process.*

If you have other talents in your group around graphic facilitation/visuals, poetry, music, mindmapping, art, etc. you may also want to invite a harvest in this form. Each of these will add a greater richness, diversity and enjoyment to the harvest.

Suggested process:

Framing & Introduction: Welcome people to the session. Make the invitation publicly to the storytellers. Explain the arcs and ask for volunteers.

Storytelling: Ask the storytellers to tell the story and the group to harvest. Be clear about the time allocated for the storytelling.

Group harvest: Give the storytellers materials to do their harvest of the harvest. Ask each of the harvesters to report in on what they found. Take at least as long for this as for the storytelling. Each of the harvests will have more depth than told during a first round. It might be helpful to have more than one round of harvest, or for the rest of the group to question each harvester to draw out additional insights.

Response from the tellers: What were the gifts to you from this group harvest? What are you taking away from this session?

Response from the group: What were the gifts to you from this group harvest? What are you taking away from this session?

Closing the session: Thank the storytellers and the harvesters. Any final remarks about what will happen to the harvest now that it has been heard. Is there enough here to return to it again and see what else surfaces? Do you want to come back as a group and hear the next version of the story?

Materials and set-up:

Ideally create a large circle with tellers as part of the circle. You may need some small tables for those harvesting onto flipchart, or they may be fine harvesting onto the floor. You'll need plenty of coloured pens and other art supplies may also be helpful.

You may want to have recording equipment on hand if you'd like to video the story and the results. It's also helpful to photograph graphic harvest.

What else can be done with a group harvest?

For the StoryHolders

Group harvesting is an ideal input both for taking stock of the learning so far in a project and for polishing a story so that it can be told to another audience. Having external ears listen to your story can help to surface things you haven't seen or haven't taken notice of during the time you were living in the experience. Often an experience is so complex and moves forward with such speed that it is almost impossible to see how it all fits together from the inside.

We suggest using a group harvest to take stock at regular intervals during a project's life. Being well witnessed can be both a blessing and a relief to people who've done the hard yards holding the space for something to happen. Good witnessing enables insights about the key pivotal points in a story to surface, as well as helping other emotions to be heard and released. Deep listening can help a story to identify its protagonists' strengths and gifts, as well as the supports and barriers they faced in contributing those gifts. It can also support a story to rise above the personal to reveal insights about the local context it happened in and even the wider systemic context.

Just as external eyes can help us see something we know well in a new light, external listeners can help story participants to see their own experiences in a new light, often revealing what has not been seen from inside the story. Even such a simple thing as naming what has not been named before adds immensely to the learning.

If you have harvesters who are expert in body-based knowing or intuition systems, such as constellation work, these can also add a rich understanding to the harvest. Those who are story or narrative practitioners can add a reflection using mythology, metaphor and other story forms.

Specific feedback can also help a team to know what to focus on in polishing their story. Often there are so many details held by the team, that a listener can be overwhelmed. Harvesting can help to bring what's important into sharp relief, supporting a story to become more focused and more potent.

For the Listeners and Harvesters

If storytelling is a skill that is both inherent to humans and one that can be polished with practice, then so is listening. Listening is the companion skill to storytelling, indeed the story arises in the space between the teller and the listener. In essence, a story needs a listener to become what it can be. We don't often get the opportunity to listen well, especially with a specific purpose, and to provide a necessary feedback loop to those within a committed project. Group story harvesting can provide such a practice and feedback loop, strengthening the community around a project shared in this way.

Harvesting is also a skill that needs practice, and it is important to experience the wide variety of ways a story or an experience can be harvested, each bringing its own richness, much as another facet brings sparkle to a gemstone. Purposeful harvesting is both a good experience and an excellent way to practice. Story listeners and harvesters may want to debrief afterwards on their experience, surfacing their challenges and learning as a way for the group to become more skillful in the future.

Beyond –
for the AoH community and wider

Harvests of projects that have gone to scale, as well as those that have faced many challenges, are a valuable contribution to the wider AoH community and beyond, helping us to increase the learning within our network. Sharing practice stories is one of the quickest ways for the principles and practices of AoH to be understood and integrated. Please share your group story harvests on the AoH Ning site.

See also:

Quick Reference Guide to Collective Story Harvest:
http://amandafenton.com/wp-content/uploads/2013/01/Collective-Story-Harvest-To-Go.pdf

Storyteller Support:
http://amandafenton.com/wp-content/uploads/2014/03/Storyteller-Support.pdf

Small Story Circle Host Guide:
http://amandafenton.com/wp-content/uploads/2013/01/Collective-Story-Harvest-Host-Guidev2.pdf

Engaging Limiting Beliefs
by Caitlin Frost

We can't solve problems by using the same kind of thinking we used when we created them.
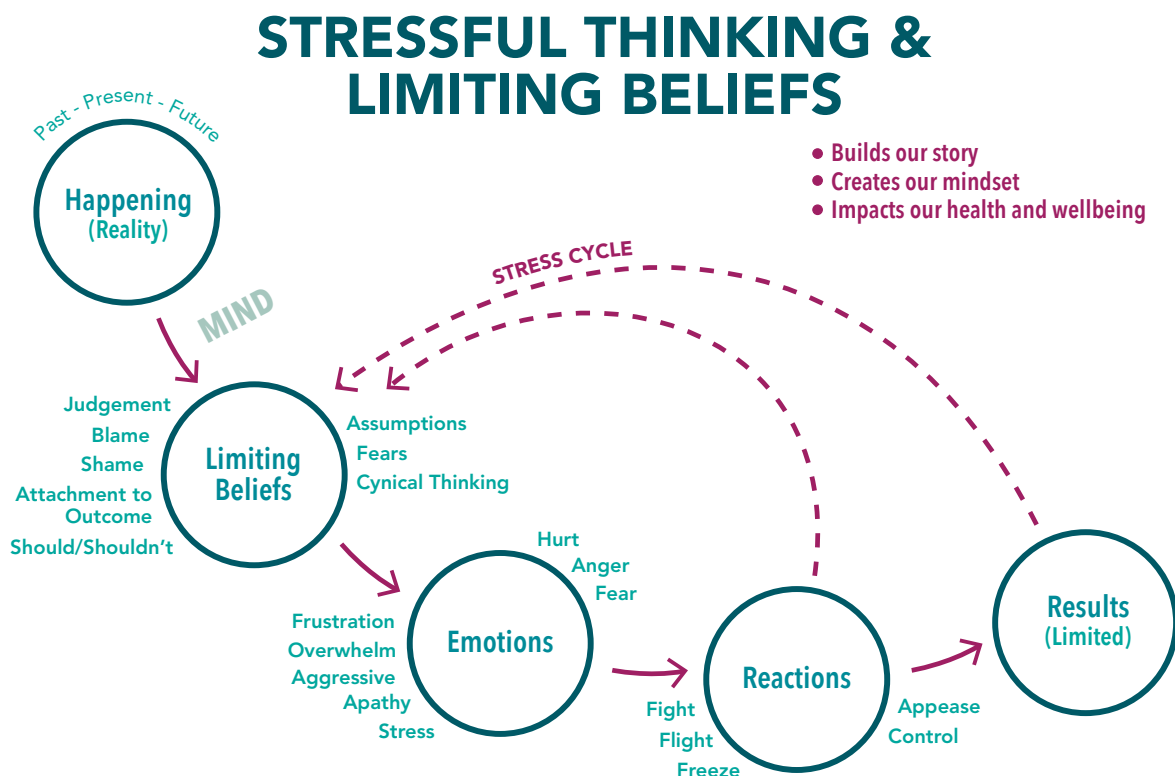
Albert Einstein

Our own beliefs - about other people, ourselves, and challenges we face have a powerful impact on our actions, emotions and even our capacity to think creatively and effectively. These may be beliefs we are aware of or not, but either way they affect our ability to lead, participate and collaborate to our full potential.

There is a high level of uncertainty in much of our work as we engage complex challenges for which we don't have solutions When we are experiencing uncertainty and stress, we are often even more influenced by our fear based thinking.

We need a diversity of people and perspectives to solve our toughest issues. We cannot do this work alone, and we cannot do it together well across our differences without challenging and expanding our own thinking as a regular practice.

While well-designed and hosted participatory group process can create better conditions for meaningful conversation and collaboration, the thinking that we bring to our leadership and work together can override the best process designs, keeping us stuck or simply re-creating the systems that are not working.

Agile, and adaptable thinking is a crucial capacity for leaders working to engage the challenges and possibilities in our organizations, communities and in our world in these times. Regardless of whether we are working on large scale global issues, or in small local teams; collaborating with others in long term initiatives or coming together for a meeting or forum: if we are working with change and complex challenges, and we want to find new ways forward together, we also need to

STRESSFUL THINKING & LIMITING BELIEFS

Past - Present - Future

Happening (Reality)

MIND

- Builds our story
- Creates our mindset
- Impacts our health and wellbeing

STRESS CYCLE

Judgement
Blame
Shame
Attachment to Outcome
Should/Shouldn't

Limiting Beliefs

Assumptions
Fears
Cynical Thinking

Hurt
Anger
Fear

Frustration
Overwhelm
Aggressive
Apathy
Stress

Emotions

Fight
Flight
Freeze

Reactions

Appease
Control

Results (Limited)

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Diagram and modification by Caitlin Frost Harvest Moon Consultants Ltd. www.caitlinfrost.ca

open our view/minds and cultivate new ways of thinking.

This requires us to develop greater awareness of the limiting beliefs we hold individually and collectively, and to engage our own thinking with rigorous practices.

The good news is that changing our beliefs and expanding our own thinking can have a profound effect on what we are able to learn, how we are able to think and act, and what we are able to see as possible.

The practice of engaging limiting beliefs shows up in a number of key places in various tools and processes in The Art of Hosting methods and practices. From the moment of invitation, our beliefs impact who we invite and include (or exclude) and how. When we are hosting and engaging in participatory process (such as Open Space, Circle, World Café, Pro-Action Café) many limiting beliefs can arise in the process of relinquishing command and control to allow space for shared leadership, genuine participation and emergence of outcomes. Limiting beliefs can also show up for people in our ability to be present,

participate fully, share leadership, speak honestly, and step into action.

In collaborative, creative process we will always find ourselves in the 'Groan Zone' (a crucial but uncomfortable part of the creative process) where our differences will often come to the surface as conflict, along with our fears and attachments to particular ideas or outcomes. We can find ourselves thrown by our own thinking in the form of judgment, cynicism and fear. These patterns of limiting beliefs also show up as barriers to genuine learning and resourceful response to emerging challenges as described by Theory U and the Cynefin framework.

As leaders and hosts of participatory process, our ability to engage our own limiting beliefs is directly connected to our ability to host and lead others through territory that is limited and challenging for them. This requires time, attention and practices that help us to illuminate our limiting beliefs (individually and collectively) and engage them at a depth that allows us to genuinely open our minds, learn and shift.

The Work

by Caitlin Frost

The most powerful leadership tool is an open mind

Byron Katie

The Work is a powerful and accessible practice for working directly with your own thinking and limiting beliefs. By identifying specifically what it is that we are believing in the moments when we get stuck, and using a series of simple yet powerful questions, we are able to inquire into our limiting beliefs, gain deeper awareness and valuable insights about our ourselves, others and the situation at hand, access more perspectives and possibility thinking.

The Work can help us to 'resolve' situations where we are stuck, and regain our clear thinking and presence when we are caught in stressful thinking. As a practice it can help to shift underlying limiting patterns in ourselves and the systems we are part of and cultivate a more open, learning mindset.

The Work can be self-facilitated as a written practice, hosted with a partner or in a group. It is a powerful and rigorous practice for "Self-Hosting" that not only reduces stress and supports us to be grounded and present, but also challenges us to learn and grow our own capacity, at our own edges, as an ongoing practice.

Like many of the Art of Hosting tools and practices, it is based in a belief in the wisdom of each person. The Work offers simple clear structure of identifying and then questioning our limiting beliefs in a way that supports each person to accessing their own learning, awareness, intelligence and presence, even in the most challenging of circumstances. It can also be facilitated with group or team to illuminate shared limiting beliefs associated with a particular project or situation.

Places we can apply The Work to engage our limiting beliefs in hosting and leadership include:

- Fear of stepping in to speak, host, lead, act.
- Fear of letting go of control
- Judgment, bias, prejudice that stops us from including, inviting, collaborating across difference.
- Conflict, blame, criticism
- Fear of failure/processing failure
- Cynical thinking "It will never work"
- Attachment to particular outcomes
- Stories of past that hold us back
- Scarcity thinking
- Illuminating blind spots and underlying limiting beliefs
- Innovation
- Challenging conversations
- Anywhere we get stuck

By working directly with our own limiting beliefs using The Work, we can expand our view of what is possible in ourselves and in our work, in sometimes surprising and often profoundly impactful ways. (See instructions for doing The Work)

It's not our differences that divide us. It's our judgements about each other that do.

Margaret Wheatley

Instructions for Doing The Work

The Work is a simple, powerful and accessible process for working directly with your own limiting beliefs and stressful thinking. It is applicable to a wide range of situations in leadership, work and personal life to address specific stuck or challenging situations and repeating patterns. It also helps us expand our thinking to access additional perspectives and possibilities and a more open, creative mindset.

Doing The Work involves a different way of engaging stuck and stressful situations by slowing down and inquiring into our own thinking. You are invited to step out of problem solving thinking (our usual approach to challenges) and open your mind to contemplate each question and give some time and space for new answers, insights and connections to emerge. From this place wise action and communication are more possible. As a practice The Work can also help you learn about and shift underlying patterns.

The Work has 2 parts, offering a simple and powerful structure to support learning and engage the underlying patterns of mind. You can do The Work with a partner/facilitator or in writing.

Part 1. IDENTIFY - The Limiting Beliefs & Stressful Thoughts

The first step of The Work is to identify specifically what you are thinking and believing when you are stuck, stressed or reactive. With a specific situation in mind, write down your uncensored, stressful thoughts (judgements, fears, assumptions, outcome attachments, your advice thinking ('you should...' 'you shouldn't' etc.), cynical thoughts...) Use short simple sentences. *i.e.: "This will never work" "They don't know what they are doing" "He should listen to my ideas."*

Part 2. INQUIRE - (Question the Belief)

Working with one belief/thought at a time, answer each of the 4 questions of The Work, honestly and from your own experience. As you answer each question, take your time, contemplate and allow answers to arise. Some of what you find may be new insight and some may be familiar. It is all a valuable part of the process. If you notice yourself moving into justification and defense – stop and move back to the questions.

Facilitators – your role is to simply ask the questions and listen. Please no advice or discussion.

The Four Questions:

1. Is it true?
Answer only 'yes' or 'no'. Take your time.

2. Can you absolutely know that it is true?
Answer only 'yes' or 'no'. Take your time to really consider. Can you absolutely know for sure it is true?

3. How do you react, what happens, when you believe that thought?
Take your time and observe the effect of believing this thought. This is valuable self-education. What emotions and sensations do you experience when you believe this thought? How do you treat that person? other people? yourself? What images come to mind? What do you get for holding onto this belief (payoff)? What are not able to do when you are believing it?

4. Who would you be without the thought?
Experience for a moment what it would be and feel like in that situation if you did not believe the thought. What do you experience and notice without it? Take your time.

The Turnarounds

The turnarounds provide a structure to stretch your thinking to consider the other possible perspectives beyond what you believe to be true when you are attached to a particular belief. Each turnaround can bring insight and understanding. They can be both playful and profoundly insightful, and sometimes uncomfortable and humbling. Be curious and compassionate. The purpose is learning and supporting a genuine shift of mindset.

Moving beyond judgement or 'right' vs 'wrong', and considered with an open curious mind, the turnarounds can offer a powerful window to understanding of yourself, others and the situation. You may not "agree" with, or condone the turned around perspective, and it can still be valuable to consider any truth and understanding available. Over time the practice can build your capacity to hold and understand multiple perspectives.

Note: *It is important to do the turnarounds after taking your thought through the 4 questions.*

Turning the thought around

Using the original wording of the thought/belief you are working with, turn the thought around in as many of these ways makes sense.
For each turnaround find at least 3 specific, genuine examples of how this turnaround could be true. Give yourself time to take in whatever learning or insight you find in each turnaround and example.

Example: He doesn't listen to me

Turn the thought around to the opposite:
(i.e. He does listen me)
Specific example: He answered my question, showing he had listened.

Turn the thought around to the other:
(i.e. I don't listen to him)
Specific example: I didn't listen to his opinion about my idea.

Turn the thought around to the self:
(i.e. I don't listen to myself)
Specific example: It was a good idea I had, and I didn't follow through when he disapproved.

Turnaround to "my thinking"

When you are doing The Work on an object, group or your body – you can sometimes turn the thought around to "My Thinking" and get some valuable insight.
For example - "My job is stressful" could turnaround to "My thinking (about my job) is stressful
Specific example – I spend a lot of time thinking about all the things I don't like about it.
(*helpful to see more clearly where the stress is coming from.)

Silence: When you have completed your inquiry, allow yourself (and your partner) the gift of silence. The Work continues to work after you are finished answering the questions if you allow space for that.

The Work: Getting Un-stuck
Working with fear

Fear based thoughts and beliefs underlie most stressful thinking patterns, and can keep us very limited and stuck in our ability to see or think clearly, learn, connect and act wisely (or at all.) Working directly with fear thinking can be very helpful in any stressful situation, and particularly where you find yourself stuck and unable to act. This can include stepping into action or leadership, challenging conversations or decisions, making or responding to change, taking on something new or difficult or anything in your life or work where you are experiencing fear or stress, or simply not acting even though it feels important.

Part 1: IDENTIFY your beliefs:

A) Think of a specific situation in your work, leadership or life where you are feeling stuck, and experiencing fear or stress about acting.

Write it out in a simple sentence beginning with:

"I want to: _____
(e.g. have a challenging conversation with my colleague; apply for a new position...)

or

"It is important to me to: _____
(e.g. speak honestly about... invite a stakeholder I have had challenges with...take the lead on something...)

B) What are you afraid will happen if you do this? What are your stressful thoughts?

Make a list:
Use short, simple sentences. Do not censor or over think or be 'wise' (e.g. they will get angry at me; it won't work, there isn't enough time, nobody will listen to me...)

Part 2: INQUIRE

Choose one belief from your list. Do The Work (4 questions and turnarounds) with a facilitator or in writing. Be curious. See what you can learn or see that is new. You may want to Work more than one thought from your list. (See "Instructions for doing The Work")

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Exercise and materials designed and modified by Caitlin Frost, Harvest Moon Consultants Ltd. www. caitlinfrost.ca

The Work: Universal Beliefs

Think of a specific situation in your work that is causing you stress, frustration, or is feeling stuck. With that situation in mind, circle any of the above thoughts you are believing about that situation.

- I don't know what to do
- I need to know what to do
- There isn't enough time
- I know what is best for him/her/them
- Something bad is going to happen
- I need to earn more money
- S/he did it wrong
- It is his/her fault
- There is not enough money
- My boss doesn't appreciate me
- My staff/team doesn't appreciate me
- They don't work hard enough
- My career should go faster
- I need to be more successful
- I am too tired
- I can't trust him/her to do a good job
- I need to make a decision
- I will look like a fool
- They are judging me
- They will be disappointed in me
- S/he should work harder

- S/he should care more
- He/she should stop complaining
- There is too much to do
- I am right
- He/she is wrong
- I need to do it right
- It is not possible to _____
- I don't want to be here
- It is a failure
- Failure is not an option
- I am not good enough
- I can't do it
- They are judging me
- The problem is too big
- It is not worth the effort
- I need to be prepared
- I need more information
- They should stop changing things
- I/we need a plan
- It is important to win this
- It is not safe to speak up around here
- He/she/they don't like me
- S/he won't like me
- I need people to like me
- I need more power
- The leader doesn't know what he/she is doing
- I will get in trouble

- I will lose my job
- They expect too much of me
- S/he is blaming me
- I need to know my purpose
- I am responsible for you
- You are responsible for me
- I need to be in control
- I need to do this on my own
- Nobody will help me
- S/he is not _____ enough (smart, young, old, educated, experienced, strong...)
- I am not _____ enough (smart, young, old, educated, experienced, strong...)
- S/he should listen to me
- S/he doesn't listen to me
- S/he doesn't respect me
- S/he should take my advice
- I have no choice

Make your own list:

Choose one belief and inquire using the 4 Questions and Turnarounds of The Work in writing or with a partner. *See instructions for doing The Work.*

The Work: Self-Facilitation Guide
One belief at a time

Identify one belief or concept about a person or situation where you are stuck, reacting, or experiencing stressful emotions. Write it down on the line below in a short, simple, uncensored sentence. With the specific stressful situation in mind, answer each of the 4 questions, one at a time. Be curious. Contemplate each question and then write your answer down. Then turn the original statement around and find specific, genuine examples. If you shift into justification or defense, stop and move back to inquiry. *(See instructions for doing The Work for more information.)*

Belief:

1. Is it true?
Answer only yes or no.

2. Can you absolutely know that it is true?
Again, answer only yes or no. Take time to really contemplate.

3. How do you react, what happens, when you believe that thought?

- *What emotions and sensations do you experience?*

- *What images come to mind (past, future, or other)?*

- *How do you show up when you are believing the thought?*

- *How do you treat the person in that situation? How do you treat others? Be specific.*

- *How do you treat yourself?*

- *What do you get for holding onto this thought? (Payoff)*

- *What are you not able to do when you believe it?*

Belief:

4. Who would you be without this thought?
What do you experience and notice in that same situation without the thought?

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Turn that thought around

Depending on your statement, you may be able to turn the thought around in all these ways or only one or two. Always return to the original statement and turn that around. For each turnaround, find at least 3 specific and genuine (to you) examples. Take time to contemplate. Open your mind and see what else could be true.

Example of a statement: "She was rude to me."

- **To the opposite:** "She was not rude to me." "She was polite to me."

- **To the other:** "I was rude to her."

- **To the self:** "I was rude to myself."

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Shared Work Model

Often the differences between collaborators — different perspectives, backgrounds, ideologies and aspirations — becomes the focus of meetings rather than getting work done together. Shared Work offers a way for us to think about taking the next step together to begin to move forward on those issues and challenges we care about in our organizations, communities, and systems.

In groups that have been successful in working together over time, there seem to be five key stances the group is able to adopt in relation to their work together.
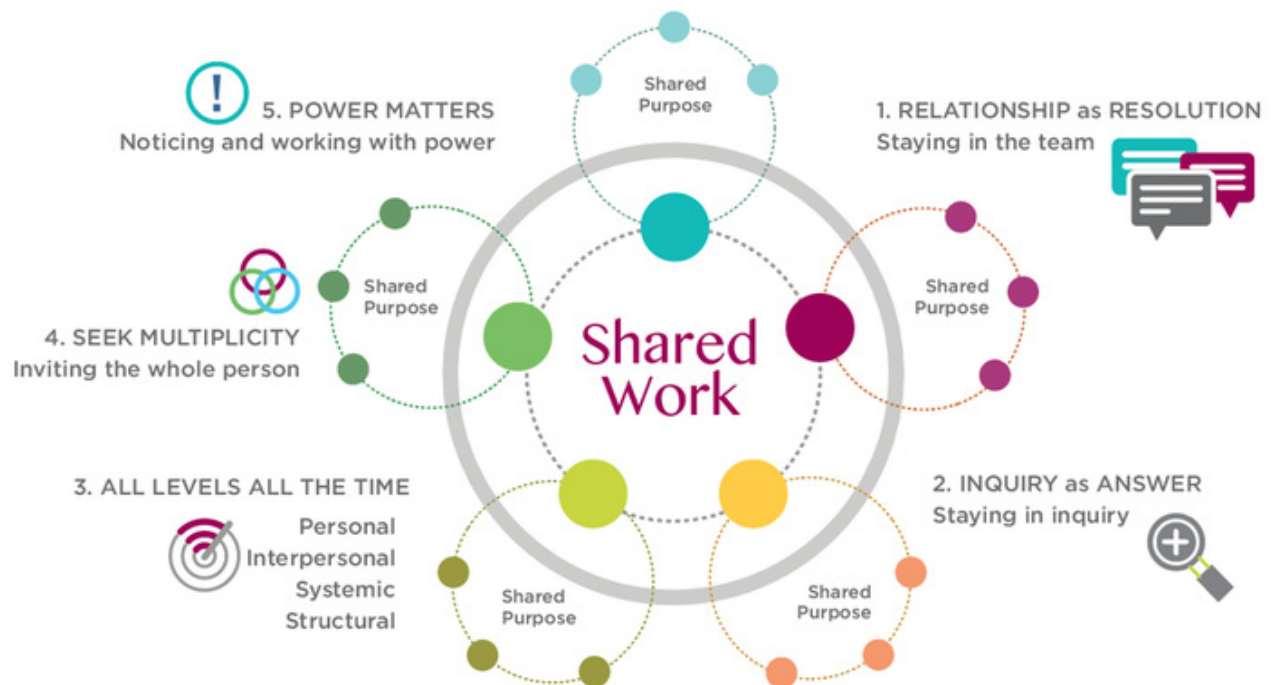
RELATIONSHIP AS RESOLUTION — At times the issues we are working on together are so complex, so deep seated, and so full of history, that a resolution of the issue is impossible in the moment. That doesn't meant that we stop working on the issues, but it does mean that sometimes our ability and willingness to stay in relationship is the resolution. As we are in relationship with each other, we can figure out how to work with the issue, what our next step should be, and how we'd like to move to more resolution. (Read more about this stance here.)

INQUIRY AS ANSWER — When we are working with challenges we don't know how to solve, we can be tempted to rely on answers we've tried in the past or best practices we've heard from other places. We're tempted to try harder with what we already know how to do. This stance asks the group to identify the questions or inquiries we should be in together to move toward new solutions. It begins from a place of "not knowing" — a risk for people who have expertise and passion for an issue! — and a commitment to work from that place together.

SEEK MULTIPLICITY — When we invite others into collaboration, we often do so from a representative mindset: Who/what constituency does this person represent? Representation is important, but it only gives us a partial understanding of those we are working with. Seeking multiplicity as a stance encourages us to invite the whole person into the collaboration with their multiple roles, identities, and perspectives. Allowing the fullness of each person we're working with leads us to better, more robust solutions.

ALL LEVELS, ALL THE TIME — When working collaboratively, we should be aware of the different levels that are present in our work: personal, interpersonal, organizational, systemic, and structural. Each of these plays out in all of our interactions, and while our collaborative work may focus on a particular level, it is important to understand that each level impacts and informs the other. We can make strategic choices on where we will intervene, but we need to understand that all levels are operating on the issue at all times.

POWER MATTERS — Considering power in our collaborations is key. We cannot ignore how power plays out in our relationships, our understanding of the issue, and the action we take. Understanding different types of power — not painting "power" with a broad brush! — as well as making strategic choices in our action related to power, can ensure that our shared work is successful.

COMPLEX PROBLEM

We arrive at the work with UNIQUE PERSPECTIVES

We are all humans together — Commonality

Humans have very different experiences — Difference

CALLS TO ACTION

We should SOLVE the PROBLEM

Let's feed people! — Do!

We should ADDRESS the REASON

Why are people hungry? — Why?

TEAMS GET STUCK

When we don't agree

TEAMS GET STUCK

You need to see my differences

You have to see we're really all the same

YET...

BOTH SIDES ARE TRUE

To get unstuck, groups just need to

TAKE THE NEXT STEP TOGETHER →

THE WORK IS THE CONTAINER THAT BRINGS US TOGETHER

5. POWER MATERS
Noticing and working with power

1. RELATIONSHIP as RESOLUTION
Staying in the team

4. SEEK MULTIPLICITY
viting the whole person

3. ALL LEVELS ALL THE TIME
Personal Interpersonal Systemic

2. INQUIRY as ANSWER
Staying in inquiry

Shared Purpose

Shared Purpose

Shared Purpose

Shared Purpose

Shared Purpose

SHARED WORK

Reorienting back to
**SHARED
WORK**

*Keeping the work
as our focus*

Allowing
**PAST PAIN AND
CURRENT EMOTION**

*Knowing that our future work
is part of addressing these*

Being right versus
**GETTING GOOD
WORK DONE**

*Being committed to
having it work out
versus **how it works out***

Adding to what we
**ALREADY KNOW
FOR SURE**

*Allowing our expertise and
passion to be just one part
of what determines how
we move forward*

GRACE
as a liberatory
practice

*Practing grace in a way that
allows us to feel freer and
less burdened by our work*

**POWER
OVER**

POSITIONAL *boss, parent*
COLLECTIVE *historic legacies*
ORGANIZATIONAL *funders*

**POWER
AMONG**

**INFINITIE, GENERATIVE,
ALWAYS AVAILABLE**

**POWER
FOR**

**ADVOCACY MODEL,
ALLY MODEL
PRACTICE ON BEHALF
OF OTHERS**

**POWER
WITH**

**COLLABORATION
TRANSACTIONAL
FORCED RELATIONSHIP**

The Art of Participatory Leadership and Equity and Inclusion

Because the Art of Participatory Leadership (AoPL) seeks to bring forth the best thinking and collaborative action among and across groups of people, it is a natural fit for convening groups around issues of equity and access. Using simple, but powerful, methodologies and practices, people who participate in hosted conversations are invited to both come together into deeper relationship as well as collectively do good work around issues that are important to them.

Overlapping Principles and Aspiration

There are four key areas of overlapping principles between the Art of Participatory Leadership (AoPL) and work geared toward addressing issues of historical oppression, diversity, and inclusion. The principles:

- **Wisdom** - all people have knowledge to share with the whole.

- **Dignity** - all people deserve to be treated with respect and with appreciation for their unique gifts and to use those gifts in all areas of their lives (personal and professional).

- **Voice** - all people deserve to have a say in what happens to them and their communities.

- **Action** - working together on issues that are important to us is the way to make change in our own lives, organizations, systems, and communities.

AoPL and equity work both hold the above core principles with the accompanying aspiration that together, we can make systemic change where the wisdom, dignity, and voice of every person impacts our action. While AoPL was not developed specifically to address issues of historical issues of access, equity, and inclusion, it is being used to bring diverse groups of people around the world together to take action around our toughest issues.

How does AoPL amplify equity work?

One of the core philosophies of AoPL is that we're smarter together. This fits nicely with traditional notions of inclusion, which stress the need for folks from marginalized groups to have an equal access and representation in a system. AoPL asks us to move a bit deeper into this inclusion conversation by shifting our typical parameters about who is invited in to our work - who are those folks who could be strange allies, surprising partners, or unexpected co-creators? What if the key to systemic change is being wildly inclusive? What might be possible if we shifted our own thinking about who "we" are?

AoPL has been viewed as "deeper than engagement" or other ways of getting others to come to the table. The notion that we need to invite others to the table is valid - especially when we are walking in the halls of power- and AoPL builds on that understanding by working to create a collective sense of "we" that moves us beyond engaging others to seeing ourselves as a whole system with valuable insights, questions, and contributions from every other person in the system.

What does work from the place of there is no one we don't need look like?

AoPL, which is based in living systems theory, holds diversity as the "smart" way of working. The complexity of diversity is seen as both a gift and as a given. There is an assumption that every person is needed for us to develop new solutions together.

AoPL provides practitioners with new ways of thinking about being smarter together, engaging others, and working from our strengths. It is inherently complimentary to work seeking equity and access.

How does AoPL differ from traditional work around diversity and inclusion?

AoPL is deeply rooted in the practice of inquiry. We know that there are answers to be had, but even more important are the questions we ask to arrive at those answers. AoPL does not engage in a pre-designed set of exercises around current or historical realities, but rather asks questions to help us create a new future together.

Typically, AoPL workshops do not have a lot of teaching that has participants agreeing on a specific set of facts or analysis, but poses powerful questions to participants that allows them to move toward shared work and action together. AoPL practice is inherently emergent. There is a strong container of principles (some shared above) and specific methodologies/tools, which allow groups to discover, name, and plan for what they would like to create together. Emergence entails not having a predetermined answer for addressing issues, but rather allows the group to come to their own best conclusions and action planning.

AoPL works to deepen ongoing efforts to address historically hierarchies and oppressions.

What's possible?

What's possible is a new conversation around issues of diversity, inclusion, and equity. A conversation that invites us to our next level of thinking about these complex topics that we have been doing really good work around for many years. A conversation that does not invite easy answers, but rather invites us into the tough questions in a new way: based in relationships and the shared power of those relationships. A conversation that stands firmly upon what we do know and what is yet to be discovered about smart ways of working together across difference.

Diamond of Participation

Divergence, emergence, convergence

In entering into an inquiry or multi stakeholder conversation we operate with three different phases in the process – divergent, emergent and convergent. Each of these phases is different, and it is important for a host to know where we are in the process – and what is needed in each phase.

The "breath' of divergence and convergence, of breathing in and breathing out is at the heart of our process design. Every process goes to a few or more of these 'breathing' phases.

In the **divergent phase**, there is as yet no clear goal. This is a "goal-seeking" phase where a clear shared purpose gives the collective direction.

Another driver in this phase is asking the right questions. If you close the divergent phase too soon, the level of newness or innovation will be less. Ideally a group will stay in inquiry in the divergent phase until a new shared and agreed solution or goal is seen by everyone.

Divergent thinking typically generates alternatives, has free-for-all open discussion, gathers diverse points of view and unpacks the problem.The divergent phase is non-linear and needs "chaos time". It is process-oriented and needs prolonged decision time.

The **convergent phase** is goal-oriented and focused, linear, structured and usually subject to time constraints. It is focused on getting results and may require quick decisions. Convergent thinking means evaluating alternatives, summarising key points, sorting ideas into categories and arriving at general conclusions.

The **emergent phase**, between the divergent and convergent, is fondly known as the 'groan zone' – It is the phase where different ideas and needs are integrated. It may require us to stretch our own understanding to hold and include other points of view. We call it the groan zone because it may feel messy - an uncomfortable stretch - but it is also the phase where the new solution emerges.
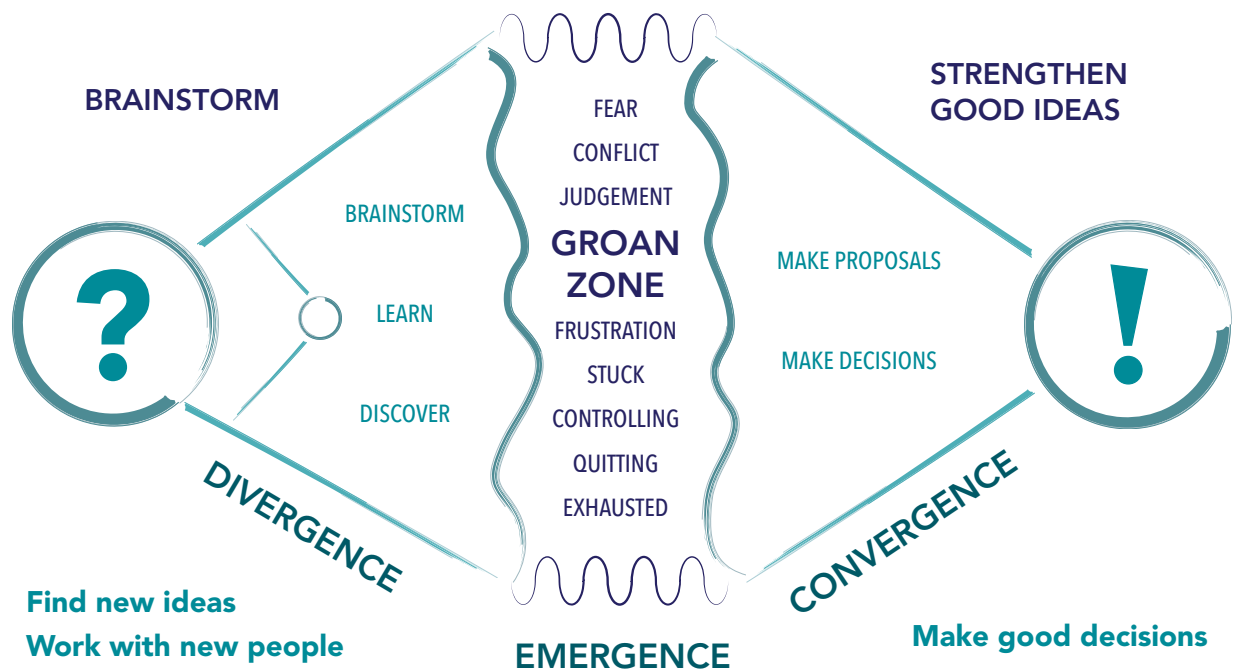
From the Facilitator's Guide to Participatory Decision-Making by Sam Kaner et al

Divergent Thinking	Convergent Thinking
Generating alternatives	Evaluating alternatives
Free-for-all open discussion	Summarizing key points
Gathering diverse points of view	Sorting ideas into categories
Unpacking the logic of a problem	Arriving at general conclusions

It is one of the secrets of the world.
We all have the key to one another's locks. But until we start to talk, we don't know it.

Michael Silverblatt

Powerful Questions

Inquiring about things that matter

Asking the right question

While answers tend to bring us to closure, questions open up to exploration. Asking the right question is the most effective way of opening up a conversation and keeping it engaging. A high-quality question focuses on what is meaningful for the participants, triggers our curiosity and invites us to explore further.

When inviting people into a conversation that matters, it is helpful to have an overall question, one that itself embodies the purpose of the meeting. This is the key question or the "calling question" for the conversation or meeting. The calling question is best formulated together with key stakeholders.

The conversation may include other questions than the calling question. The questions you choose or that people discover during conversation are critical to its success. A hosted conversation could explore one question or a series of related questions.

A POWERFUL QUESTION…

- Is simple and clear
- Is thought provoking
- Generates energy
- Focuses inquiry
- Challenges assumptions
- Opens new possibilities
- Evokes more questions

SOME GUIDELINES FOR FORMING QUESTIONS:

- A well-crafted question attracts energy and focuses attention on what matters. Experienced hosts recommend asking open-ended questions, not ones that have a simple yes/no answer.
- Good questions invite inquiry and curiosity. They do not need to promote action or problem solving immediately.
- You'll know a good question when it continues to surface good ideas and possibilities.
- Check possible questions with key people who will take part in a conversation. Does it hold their attention and energy?

If I had an hour to solve a problem and my life depended on it, I would use the first 55 minutes to formulate the right question because as soon as I have identified the right question I can solve the problem in less than five minutes.

Albert Einstein

When Practicing Dialogue
Helpful hints

The following practices can radically shift the quality of any conversation, whether with one person, or in a small circle or with hundreds of people. As a muscle, they need to be practiced regularly to become natural in any context. Practice them and invite others to practice them with you!

FOCUS ON WHAT MATTERS
We have no time to lose for what doesn't.

SUSPEND JUDGMENTS, ASSUMPTIONS, CERTAINTIES
No one knows it all and it is not about knowing who is right or wrong. It is about exploring together and surfacing what we do not know or see yet.

SPEAK ONE AT A TIME
Invite to speak with intention.

LISTEN TO EACH OTHER CAREFULLY
Invite to listen with attention

LISTEN TOGETHER FOR INSIGHTS AND DEEPER QUESTIONS
Do not remain at the surface of what you already know. Engage fully with others into bringing what we do not know yet to the surface.

LINK AND CONNECT IDEAS
This is how you can learn, surface what do not know yet, and innovate.

SLOW DOWN
We are so often caught in a hectic flow of actions. Slowing down helps to foster more reflection.

BE AWARE OF YOUR IMPACT ON THE GROUP
Do not monopolise the speaking time. Make sure everybody can be heard. Focus on what is in the middle rather than what is in your mind.

ACCEPT THAT DIVERGENT OPINIONS ARE OKAY
We do not need to reach a consensus on what we are discussing. Innovation comes from putting different perspectives together.

CONTRIBUTE WITH YOUR MIND AND HEART
Bring your full self into the room. Allow yourself to be both a professional and a human being.

PLAY, DOODLE, DRAW
Use a large sheet in the middle of your group as a space to capture the results of your collective reflection.

HAVE FUN!
What if enjoying ourselves was the key to improving our learning and performance?

These hints are adapted from World Café etiquette, The Circle Way, and Theory U.

Never doubt that a small group of thoughtful, committed citizens can change the world. Indeed, it is the only thing that ever has.

Margaret Mead

Learning Dialogues
Catalyzing innovation

Many efforts to effect change in a system begin with conversations among people with a stake in that system. Yet such interactions often fail to penetrate to the depth necessary to release latent forces for change. Learning Dialogues are a set of in-depth, one-on-one conversations between you—the practitioner, consultant, or other kind of change agent— and identified participants. These conversations catalyze an Innovation Lab and other change efforts.

LEARNING DIALOGUES are intended to engage participants in a reflective and generative conversation. Dialogue interviews:

- Provide you with insights into questions and challenges that the other people face,
- May help you to find partners for a project,
- Prepare participants for to an upcoming event,
- Begin to build a generative field for the initiative you want to co-create.

PURPOSE

To create a generative conversation that allows for reflection, thinking together and some sparks of collective creativity to happen.

OUTCOMES

- Data on the participants' current challenges, questions, and expectations.
- Increased awareness among participants about the process and how it might serve their needs and intentions.
- An increased level of trust between facilitators and participants that helps to create a generative field of connections.

PEOPLE & PLACE

Learning Dialogue conversations work best face-to-face. If not possible, use phone interviews.

TIME

- 30 to 60 minutes for a phone conversation.
- 30 to 90 minutes for a face-to-face conversation.

Both figures are estimates and need to be adjusted to the specific context.

MATERIALS

- This conversation guide
- Paper and pen to take notes, sometimes an audio recorder

STEP 1 PREPARATION

- Define the specific context and purpose of your Innovation Lab, based on your co-initiation session.
- Schedule the conversations.
- If the conversations will be conducted face-to-face find a quiet space.
- Get information about the participant and her or his organization.

STEP 2 OPEN MIND AND HEART

Before you meet the person allow for some quiet preparation or silence. For example, 15 to 30 minutes prior to a face-to-face conversation begin to anticipate the conversation with an open mind and heart.

KEEP IN MIND THESE PRINCIPLES:

- Create transparency and trust about the purpose and the process of the interview.
- Practice deep listening.
- Suspend your "Voice of Judgment": look at the situation through the eyes of the interviewee, don't judge.
- Access you ignorance: As the conversation unfolds, pay attention to and trust the questions that occur to you.

- Access your appreciative listening: Thoroughly appreciate and enjoy the story that you hear unfolding. Put yourself in your interviewee's shoes.

- Access your generative listening: Try to focus on the best future possibility for your interviewee and the situation at hand.

- Go with the flow: Don't interrupt. Ask questions spontaneously. Always feel free to deviate from your questionnaire if important questions occur to you.

Leverage the power of presence and silence: One of the most effective "interventions" as an interviewer is to be fully present with the interviewee—and not to interrupt a brief moment of silence.

Step 3 The Dialogue

Begin the conversation. Use the below questions as a guide, but depart from it to allow the conversation to develop its direction.

- Tell me a story about your work as it relates to this topic?

- What are some of the patterns or issues you're noticing related to this topic that are keeping us stuck?

- Deep in your bones what do you know we need to do (even if we aren't doing it)?

- What gives you optimism? What keeps you in the work? How do you stay motivated?

- If there was one small thing we could do to make a difference what do you think it could be?

Add any other questions which have grabbed your attention.

Step 4 Reflection on the Interview

Take some time immediately after the interview to review:

- What struck me most? What surprised me?

- What touched me?

- Is there anything I need to follow-up on?

After all interviews have been completed, review the interview data, and summarize results.

Step 5 Close the Feedback Loop

After each interview (by the following morning) send a thank-you note to your interviewee.

Source: C. Otto Scharmer, Theory U: Chapters 17, 21
http://www.presencing.com/tools/dialogue-interviews

Seven Little Helpers
Essentials of conversation

There are seven "helpers" that help us design a good conversation. At the bare minimum, if you use these tools, conversations will grow deeper and work will occur at a more meaningful level. These seven helpers bring form to fear and uncertainty and help us stay in the chaos of not knowing the answers. They help us to move through uncomfortable places together, like conflict, uncertainty, fear and the groan zone and to arrive at wise action.

1. Be Present

Inviting presence is a core practice of hosting, but it is also a key practice for laying the groundwork for a good meeting. There are many ways of bringing a group to presence, including:

- Start with an intention or prayer
- Start with a moment of silence
- Check in with a personal question related to the theme of the meeting
- Pass a talking piece and provide space for each voice to be heard
- Start well. Start slowly. Check everyone in.

2. Have a good question

A good question is aligned with the need and purpose of the meeting and invites us to go to another level. Good questions are put into the centre of a circle and the group speaks through them. Having a powerful question at the center keeps the focus on the work and helps a group stay away from unhelpful behaviours like personal attacks, politics and closed minds.

A good question has the following characteristics:

- Is simple and clear
- Is thought provoking
- Generates energy
- Focuses inquiry
- Challenges assumptions
- Opens new possibilities
- Evokes more questions

It is wise to design these questions beforehand and make them essential pieces of the invitation for others to join you. As you dive into these questions, harvest the new questions that are arising. They represent the path you need to take.

3. Use a talking piece

In it's simplest form a talking piece is simply an object that passes from hand to hand. When one is holding the piece, one is invited to speak, and everyone else is invited to listen. Using a talking piece has the powerful effect of ensuring that every voice is heard and it sharpens both speech and listening. It slows down a conversation so that when things are moving too fast, or people begin speaking over one another and the listening stops, a talking piece restores calm and smoothness. Conducting the opening round of a conversation with a talking piece sets the tone for the meeting and helps people to remember the power of this simple tool.

Of course a talking piece is really a minimal form of structure. Every meeting should have some form of structure that helps to work with the chaos and order that is needed to co-discover new ideas. There are many forms and processes to choose from but it is important to align them with the nature of living systems if innovation and wisdom is to arise from chaos and uncertainty.

At more sophisticated levels, when you need to do more work, you can use more formal processes that work with these kinds of contexts. Each of these processes has a sweet spot, its own best use, which you can think about as you plan meetings. Blend as necessary.

4. Harvest

Never meet unless you plan to harvest your learnings. The basic principle here is to remember that you are not planning a meeting, you are instead planning a harvest. Know what is needed and plan the process accordingly. Harvests don't always have to be visible; sometimes you plan to meet just to create learning. But support that personal learning with good questions and practice personal harvesting.

To harvest well, be aware of four things:

- **Create an artifact.** Harvesting is about making knowledge visible. Make a mind map, draw pictures, take notes, but whatever you do create a record of your conversation.

- **Have a feedback loop.** Artifacts are useless if they sit on the shelf. Know how you will use your harvest before you begin your meeting. Is it going into the system? Will it create questions for a future meeting? Is it to be shared with people as news and learning? Figure it out and make plans to share the harvest.

- **Be aware of both intentional and emergent harvest.** Harvest answers to the specific questions you are asking, but also make sure you are paying attention to the cool stuff that is emerging in good conversations. There is real value in what's coming up that none could anticipate. Harvest it.

- **The more a harvest is co-created, the more it is co-owned.** Don't just appoint a secretary, note taker or a scribe. Invite people to co-create the harvest. Place paper in the middle of the table so that everyone can reach it. Hand out post it notes so people can capture ideas and add them to the whole. Use your creative spirit to find ways to have the group host their own harvest.

5. Make a wise decision

If your meeting needs to come to a decision, make it a wise one. Wise decisions emerge from conversation, not voting. The simplest way to

arrive at a wise decision is to use the three thumbs consensus process. It works like this:

First, clarify a proposal. A proposal is a suggestion for how something might be done. Have it worded and written and placed in the centre of the circle. Poll the group asking each person to offer their thumb in three positions. UP means "I'm good with it." SIDEWAYS means "I need more clarity before I give the thumbs up" DOWN means "this proposal violates my integrity...I mean seriously."

As each person indicates their level of support for the proposal, note the down and sideways thumbs. Go to the down thumbs first and ask: "what would it take for you to be able to support this proposal." Collectively help the participant word another proposal, or a change to the current one. If the process is truly a consensus building one, people are allowed to vote thumbs down only if they are willing to participate in making a proposal that works. Hijacking a group gets rewarded with a vote. Majority rules.

Once you have dealt with the down thumbs, do the same with the sideways thumbs. Sideways doesn't mean "no" but rather "I need clarity."

Answer the questions or clarify the concerns.

If you have had a good conversation leading to the proposal, you should not be surprised by any down thumbs. If you are, reflect on that experience and think about what you could have done differently. (Refer to The Facilitator's Guide to Participatory Decision Making by Sam Kaner.)

6. Act.

Once you have decided what to do, act. There isn't much more to say about that except that wise action is action that doesn't not over-extend or under-extend the resources of a group. Action arises from the personal choice to responsibility for what you love. Commit to the work and do it.

7. Stay together

Relationships create sustainability. If you stay together as friends, mates or family, you become accountable to one another and you can face challenges better. When you feel your relationship to your closest mates slipping, call it out and host a conversation about it. Trust is a group's most precious resource. Use it well.

Working Together Using AoH
Hosting and designing as a team

Working Together to Create a 'Container'

How are we going to behave together in pursuit of our purpose?

When we enter an inquiry where we do not have ready or easy answers and we cannot see the obvious solution – we also enter "chaos" together. In walking the chaordic path together it is wise to start by creating the conditions that can help contain that chaos. - We call this creating a "container". One fundamental way to create a container is to agree on how we want to work or "travel" together in pursuit of our goal. In other words we define some agreements or principles of co-operation.

PRINCIPLES - when defined with clarity, conviction and common understanding - guide our pursuit of purpose. Developing them requires engaging the whole person, not just the intellect. Principles bind a community together and serve as a touchstone to remind us of how we have agreed to act and decide together around our purpose.

Scientists have discovered that the small, brave act of cooperating with another person, of choosing trust over cynicism, generosity over selfishness, makes the brain light up with quiet joy.

Natalie Angier, *Pulitzer Prize-winning New York Times reporter, describing a study of the effects of behavior on brain chemistry*

Who Makes Up a Core Hosting Team

An ideal hosting team consists of:

- The CALLER who has sensed the need to convene this process

- MEMBERS OF THEIR TEAM who have an in-depth understanding of the content

- INTERNAL CONSULTANTS who understand the culture of the organization and how change can be led and accompanied successfully in this context

- EXTERNAL CONSULTANTS who bring their experience and practices from outside and help the team to take some distance from the context in which they are absorbed in order to gain some fresh perspectives.

The size of this team will vary depending on the scale of the process.

A CORE HOSTING TEAM IS ABOUT LEARNING TOGETHER

In such a team, everybody is learning. Being clear about what you can contribute and what you can expect to learn will help the team to work consciously together in service of the people invited and the purpose. It is highly recommended to have seasoned people in the team who can help less experienced practitioners to deepen their understanding of this way of working through practicing. Sometimes, these seasoned practitioners will even not be visible to the participants. They act then as coaches of the team.

Roles in a Core Hosting Team

Caller

The caller is the client of the process. They have sensed the need for it and have invited the hosting team to help them initiate a process where others are invited in order to produce outcomes from sharing their knowledge together. The caller is part of the process and:

- Co-drafts and send the invitation
- Welcomes people
- Frames the context and the purpose
- Listens to what is coming out of the conversations
- Helps the hosting team to adapt the process if necessary
- Commits to follow-up on the outcomes

Strategic Perspective Holders

The people who hold the strategic perspective include the caller and other people who have a key stake in the outcomes of the event. These people specifically:

- Liaise with speakers to help them see where their interventions fit
- Liaise with guests to help them catch up when they arrive and make sense of the outcomes of the seminar
- Listen intentionally for horizontal questions
- Capture the key aspects learned by the group
- Liaise with the hosts to keep the event on tracks

Process Hosts

Before an event Process Hosts offer their skills of designing so that an architecture for the process can be created. This is created taking into account the context and purpose of the process, as well as the desired outcomes. During an event, the focus of the process hosts is on facilitating the processes that make up the overall architecture. This includes framing in each method, explaining how people will participate, offering stillness whilst people are in conversations, i.e. holding space, and supporting the gathering of insights as a result of the conversations. In terms of an, the process host is the most visible part of the team, but they cannot do their role without the support of the other members of the team

Speakers

At different points during an event, e.g. welcome, framing a process or closing, a speaker offers in perspective. The purpose for doing this is to inspire and catalyse the subsequent conversations that the participants will engage in. Perspective can be offering in the key challenge that needs to be faced or the most important questions that if engaged in would make a difference. It can also be offering in a new way of looking at issues. This role of speaker is different to more traditional speakers in that they do not take the stance of an expert with the preferred approach or option. Instead they offer their knowledge and perspective to invite in more diversity of views and collective intelligence.

Harvesters

During the design phase of a process, thinking ahead to what we wish to collect as a result of the conversation, i.e. the harvest is very important and shapes what the Harvesters will be gathering and looking out for during an event. Specifically, during an event their role includes

- Being of service to the strategic group and speakers at anytime
- Collecting the results of the conversations depending on the level required, e.g. detailed notes of what was spoken, worksheets participants have filled in, graphic recording, meta level, etc.
- Collecting all pieces of harvesting throughout the event, e.g. worksheet, flipcharts, etc.
- Recording real time visually, e.g. mind maps, photographing, videoing, creating a visual landscape
- Producing the artefacts of what the process produced, e.g. landscape, newsletter/live minutes, full record, strategic report, etc.

CORE TEAM

Those holding the **Strategic Perspective** are the ones who understand the need for the initiative and are connected to the power and resources to make it happen and give it the best chance of success.
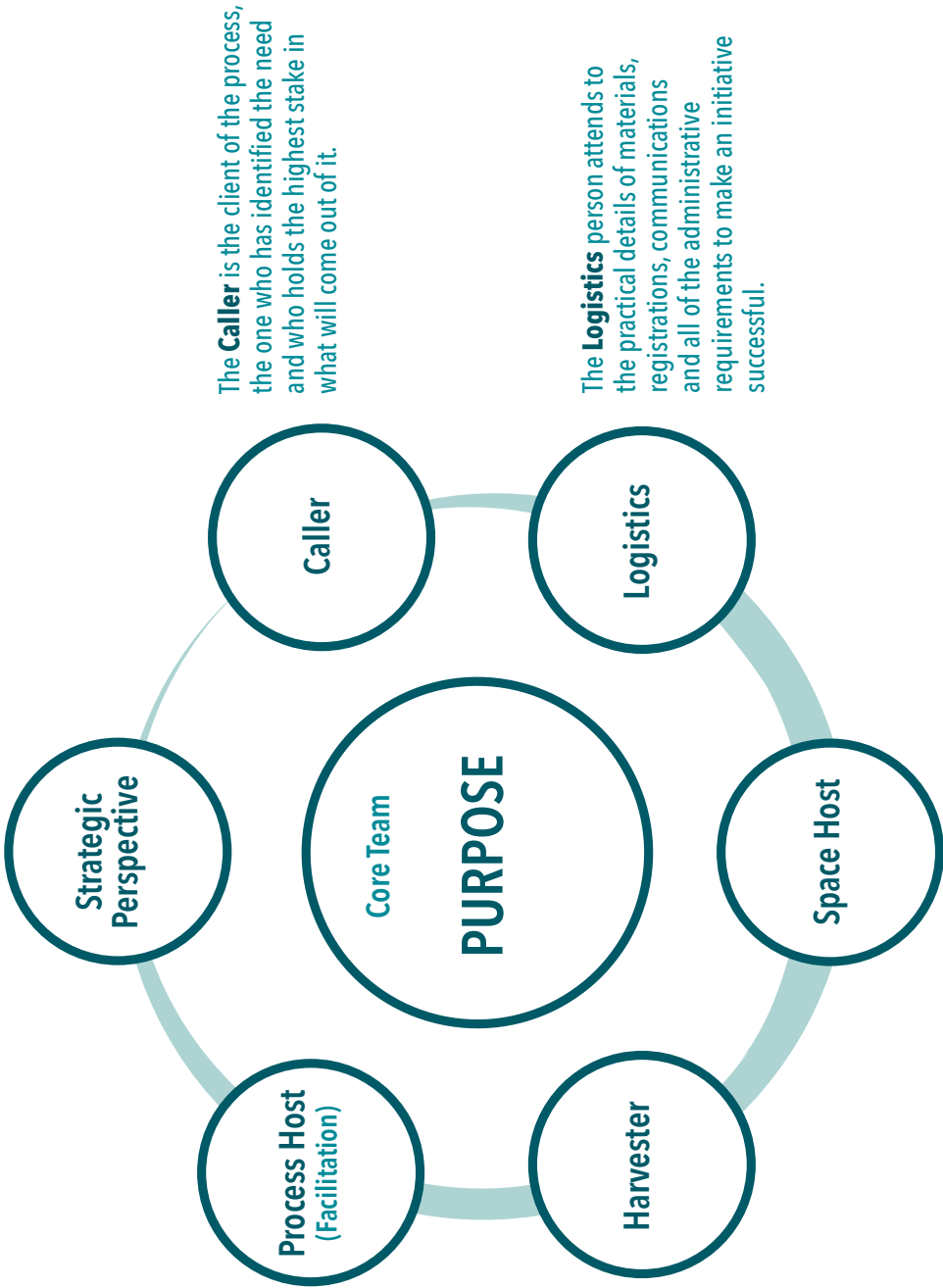
The **Caller** is the client of the process, the one who has identified the need and who holds the highest stake in what will come out of it.

The **Logistics** person attends to the practical details of materials, registrations, communications and all of the administrative requirements to make an initiative successful.

The **Space Host** looks after both the physical and aesthetic aspects of the space and holds the objective of creating hospitable conditions for working together.

The **Process Host** advises on the design of the conversations, introduces the processes, their purpose, and explains how people can participate. They hold space on conversations have started.

Harvesters capture the key insights of what the group is engaging with using different tools in order to make the learning visible and usable.

- Caller
- Logistics
- Strategic Perspective
- Space Host
- Process Host (Facilitation)
- Harvester

Core Team

PURPOSE

Space and Beauty Hosts

The purpose of space hosting is to contribute to creating the optimal learning conditions by tending the physical and non-physical (energetic / subtle) levels. It consists of multiple levels which depending on the context, includes:

Physical Hosting

- Location of venue– proximity to access to nature, transport links, etc.
- Venue – standard and style of facility, e.g., main group room, break out rooms, accommodation, catering, etc.
- Main Group Room – Spacious, light, adaptable, wall space for harvesting
- Setting the optimal learning space when in location e.g., comfort and access for participants, learning space for optimal flow, which includes ample space for harvesting, location of food/drinks, amenities, e.g., restrooms, cloakrooms, etc

Energetic Hosting
sometimes known as holding space

- Connecting to the authentic higher purpose that serves the common good
- Working intentionally with the more subtle levels of emotional, subliminal (unconscious) and thought-based aspects of human interaction that can distract or negatively disturb the creation of a generative learning field

- Noticing the 'unspoken', the shadow, and if in service, giving voice to them, either by asking a question, naming the energy or emotion in the field, or ground it intentionally

Logistics and Administration Team

When hosting a very large event, then it is applicable to have a logistics person or even team as tending to the practical details becomes even more important when working with large number. Specifically, this role includes:

- Liaise with people in charge of the venue on any issue
- Ensure proper set-up of the space
- Handle laptops & USB sticks whenever used
- Handle requests coming from all other teams
- Test all equipment: microphones, PC, projector...

Follow-Up / Strategic Continuity

After an event, it is good practice to gather as an entire Core Hosting Team and to harvest out both the key content insights that will move the work forward as well as the key process insights that will help to shape the next process steps. This allows the wisest next steps in service of the development of individuals, the organisation and the common good to be identified.

On Action and Participatory Process
When action is appropriate

"Sometimes, there are gatherings where next steps and action plans are important and necessary and are the reason why we are gathering. But always? No."

Chris Corrigan

WHEN IS ACTION AN APPROPRIATE PART OF YOUR GATHERING? ASK YOURSELVES:

- Is there capacity to support those actions and action champions post-event?

- Is everyone able to realistically do their actions or take their next steps, given the reality of what their world is like "on Monday"?

- Do you have the resources, time, technology, leadership, and mentorship in place to support action?

- Do you have the support from key leadership who is willing to say "yes" to the actions, creating space where learning can occur from failures?

- Do people have the resources, information, flexibility, capacity and freedom to act and to meet – sometimes across organizational lines or outside of their organizational role – on what they have identified as action items?

- Do you have a plan for keeping people together to balance work, co-learning and relationships?

- Are you ready to work with power and leadership, to balance the need for new action with the reality of mundane tasks back in the main-stream, deal with resourcing issues, and working with and supporting new ideas that might be at odds with the existing flow and structure?

BECAUSE IF NOT, HAVING THE GROUP IDENTIFY ACTIONS AND NEXT STEPS AND EXPECTING TO OWN THEM IS NOT FAIR. DON'T INVITE ACTION IF YOU CAN'T PUT LEGS UNDER IT.

"Please, think really carefully about whether or not your gathering needs action steps, especially if you are planning a gathering where the purpose is for people to simply be together learning and connecting. That alone is significant action. Do we really need to justify it any further? It is easy to make a list of to do's at the end of a meeting and feel like something has been accomplished, but that is a naive approach to change. If action is required get really clear about who needs to be involved to make it happen. Think about who enables action or who can stop it and what resources are required. And if the resources aren't available or accessible, then make a different plan."

Chris Corrigan

Reflect on if it is you who feels the need for action, or the participants?

Are participants coming for content and relationships? Then they are best served by their face-to-face-time sharing best practices, exploring new ideas, networking and improving their skills and knowledge. Ensure celebration of hard work accomplished during the session. Focus on creating a one off great and inspiring, awareness raising event of collective dialogue.

If the need for action/next steps/sense of urgency is felt by the organizers and not the participants, participants will feel pushed into a shape they did not need. For them – they will want to spend their hours discussing, collaborating, networking. The dialogue IS the action.

So why do organizations focus on improving idea generation, when this is almost never the problem? Because idea generation is the easy part! It's the one area where you can show measurable improvement almost immediately. But if your main weakness is idea selection, or idea execution, then generating more ideas won't help. In fact, generating more ideas can actually make you less innovative, because the weaknesses in other parts of the process will sink the new efforts, which in turn increases the frustration of your people – demotivating them.

Tim Kastelle
from Why Your Innovation Contest Won't Work

Given all the above, there is a time and a place for gatherings that are not about action and follow-up. The benefit of those gatherings are about remembering there is a different way to meet and work together.

- To raise our collective consciousness.

- To remember the deeper purpose that called us to our work.

- To expand our thinking about what is possible.

- To plant seeds that may or may not germinate.

- To find a tribe of others that care about the same things you do.

- To bring the 'human' back into our overly mechanized meetings.

- To lift out of our silos and our isolation to rediscover our sense of connection to each other (and even our bigger sense of connection to our communities and to the earth).

- To find that place of leadership in ourselves where we see something that needs to take change and we take the first steps – often in convening a conversation about it.

Or as our Art of Hosting colleague Tenneson Woolf says, "To change the vibration of the people gathered. To what? I suppose I think of it as being to a wholeness consciousness, not just as fanciful, abstract idea, but as access to something most humans have buried in some part of our DNA that helps us do things well."

Probes, Prototypes and Pilots

By Chris Corrigan

I've been working in the world of program development with a lot of complexity and innovation and co-creation lately and have seen these three terms used sometimes interchangeably to describe a strategic move. As a result, I've been adopting a more disciplined approach to these three kinds of activities.

FIRST SOME DEFINITIONS.

Taken explicitly from Cynefin, a **PROBE** is an activity that teaches you about the context that you are working with. The actual outcome of the probe doesn't matter much because the point is to create an intervention of some kind and see how your context responds. You learn about the context and that helps you make better bets as you move forward – "more stories like this, less stories like this" to quote Dave Snowden. Probes are small, safe to fail and easily observed. They help to test different and conflicting hypotheses about the context. If 8 out of 10 of your probes are not failing, you aren't learning much about the limits of your context. Probes are actually methods of developmental evaluation.

A **PROTOTYPE** is an activity that is designed to give you an idea of how a concept might work in reality. Prototypes are designs that are implemented for a short time, adjusted through a few iterations and improved upon. The purpose of a prototype is to put something into play and look at its performance. You need to have some success with a prototype in order to know what parts of it are worth building upon. Prototypes straddle the world of "safe to fail" and fail safe. They are both developmental evaluations tools and they also require some level of summative evaluation in order to be fully understood. Prototypes are also probes, and you can learn a lot about the system from how they work.

A **PILOT** is a project designed to prove the worthiness of an approach or a solution. You need it to have an actual positive effect in its outcomes, and it's less safe to fail. Pilots are often designed to achieve success, which is a good approach if you have studied the context with a set of probes and maybe prototyped an approach or two. Without good intelligence about the context you are working with, pilots are often shown to work by manipulating the results. A pilot project will run for a discrete amount of time and will then be summatively evaluated in order to determine its efficacy. If it shows promise, it may be repeated, although there is always a danger of creating a "best practice" that does not translate across different contexts. If a pilot project is done well and works, it should be integrated with the basic operating procedure of an organization, and tinkered with over time, until it starts showing signs of weakened effectiveness. From then on, it can become a program. And pilots are also probes, and as you work with them they too will tell you a lot about what is possible in the system.

The distinctions between these three things are quite important. Often change is championed in the non-profit word with the funding of pilot projects, the design of which is based on hunches and guesses about what works, or worse, a set of social science research data that is merely one of many possible hypotheses, privileged only by the intensity of effort that went into the study. We see this all the time with needs assessments, gap analyses and SWOT-type environmental scans.

RATHER THAN THINKING OF THESE AS GRADIENTS ON A LINE THOUGH, I HAVE BEEN THINKING OF THEM AS A NESTED SET OF CIRCLES.

Each one contains elements of the one within it. Developing one will be better if have based your development on the levels below it. When you are confronted with complexity and several different ideas of how to move forward, run a set of probes to explore those ideas. When you have an informed hunch, start prototyping to see what you can learn about interventions. What you learn from those can be put to use as pilots to eventually become standard programs.

PROBES, PROTOTYPES, PILOTS
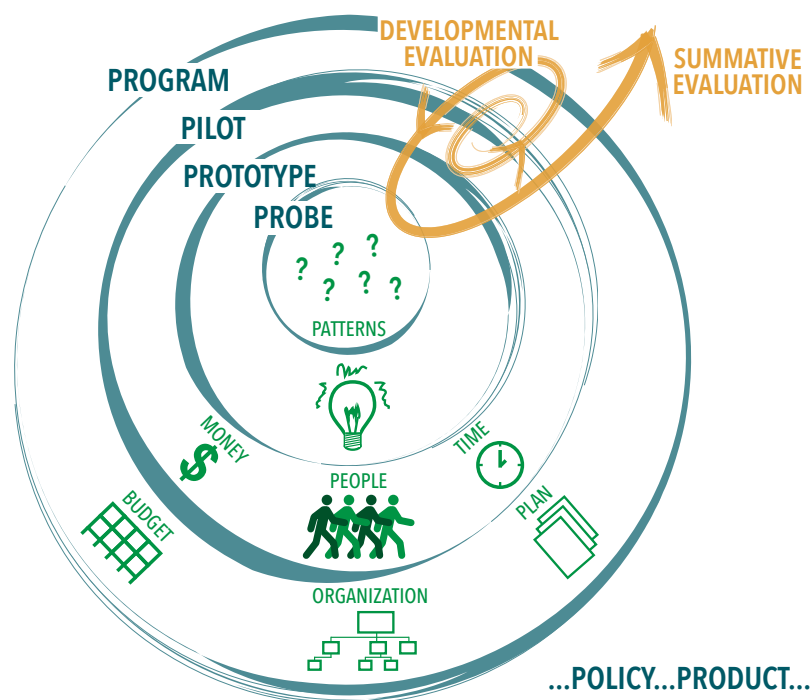
By far, the most important mindshift in this whole area is adopting the right thinking about probes. Because pilot projects and even prototyping is common in the social development world, we tend to rely on these methods as ways of innovating. And we tend to design them from an outcomes basis, looking to game the results towards positive outcomes. I have seen very few pilot projects "fail" even if they have not been renewed or funded. Working with probes turns this approach inside out. We seek to explore failure so we can learn about the tolerances and the landscape of the system we are working in. We "probe" around these fail points to see what we can learn about the context of our work. When we learn something positive we design things to take advantage of this moment. We deliberately do things to test hypotheses and, if you're really good and you are in a safe-to-fail position, you can even try to create failures to see how they work. That way you can identify weak signals of failure and notice them when you see them so that when you come to design prototypes and pilots, you "know when to hold 'em and know when to fold 'em."

AS YOU MOVE THROUGH THESE PHASES OF WORK, THE FOLLOWING PRACTICES ARE USEFUL:

- **DIALOGUE IS HELPFUL AT EVERY SCALE.** When you are working in a complex system, dialogue ensures that you are getting dissent, contrary views and outlying ideas into the process. Complex problems cannot be addressed well with a top-down roll out of a change initiative or highly controlled implementations of a single person's brilliant idea. If at any point people are working on any stage of this alone, you are in danger territory and you need another pair of eyes on it at the very least.

- **EVALUATION IS YOUR FRIEND AND YOUR ENEMY.** At every stage you need to be making meaning and evaluating what is going on, but it is critically important to use the right evaluation tools. Developmental evaluation tools – with their emphasis on collective sense making, rapid feedback loops and visible organizational and personal learning – are

critical in any complexity project, and they are essential in the first three stages of this process. As you move to more and more stable projects, you can use more traditional summative evaluation methods, but you must always be careful not to manage to towards targets. Such an error results in data like "We had a 62% participation rate in our diversity training" which tells you nothing about how you changed things, but can shift the project focus to trying to achieve a 75% participation rate next cycle. This is an especially pervasive metric in engagement processes. And so you must…

- **Monitor, monitor, monitor.** Intervening in a complex system always means acting without the certainty that what you are doing is helpful. You need data and you need it on a short term and regular basis. This can be accomplished by formal and informal ongoing conversations and story captures about what is happening in the system (are we hearing more stories like the ones we want?) or through a SenseMaker™ monitoring project that allows employees to end their data with a little data capture.

- **These practices are nested, not linear.** An always to remember that this is not a multi-step linear process for intervening in a complex system. In a large organization, you can expect all of these things to be going on all the time. Building the capacity for that is a kind of holy grail and would constitute a 21st century version of the Learning Organization or a Learning Community in my books.

PLANNING GUIDES

CHAORDIC STEPPING STONES

Planning in Complexity

Process
Logistics
Practicalities

WHO
WHAT
TIME

STRUCTURING

Structure
Form
Method

Concept

Limiting Beliefs
Assumptions
Judgements
Fears

Tangible
REPORTS
VIDEO
SUMMARIES
RECOMMENDATIONS

Intangible
RELATIONSHIP
COMMUNITY
COMMITMENT

IMPLEMENTING

Outputs

Architecture of Implementation

What will support the action
RESOURCES
POWER
INFLUENCE
WHAT ARE PEOPLE READY TO DO?
WHAT EMPOWERS PEOPLE TO BE PART OF ACTION

INVITING

Need Why?

People Who?

Principles How we work together

Purpose Direction

Levels of Invitation
TYPES OF INVITATION
MORE THAN ONE FORM
PERSONAL CONNECTION

Chaordic Stepping Stones
A planning tool for designing participatory processes
By Chris Corrigan

Working in the chaordic space

The term "chaordic" comes from combining "chaos" and "order." It is a word coined by Dee Hock to identify organizations that intentionally blend characteristic of chaos and order. In this document, we use this term to indicate that we are working in a space of complexity, where there is much that is unpredictable and unknown. Our job as people who are hosting strategic work in this space - whether it is is a conversation, a meeting or a longer term strategic initiative - is to bring some form and order to the unpredictability while letting the emergent properties of complex systems bring us new ideas, insight and innovation. This is difficult to do without a road map, and the chaordic stepping stones provide both a guide path and a set of lenses to plan and reflect on this work.

This tool can be used by callers (those who see that there is work to be done in the world) in order to get their thinking straight and create good containers for planning and action. It can also be used by core teams that come together around a strategic need and purpose, to continually refine their design for their work. The tool is designed to be used collectively, structured around a series of questions that can be answered by a group. Participatory processes require participatory leadership and these question will help you guide your planning to get the most out of a group.

The tool can be used sequentially to plan out a project and it can be used as a reflective tool to review and refine the work.

Designing Meetings and Processes

In designing a meeting or a process, each of these stepping stones is activated by asking key questions. In beginning to design work together we can select from these questions (or create others) to help us explore each stone as we lay it in place.

In this document we have given you a basic definition of the stepping stone, some sample questions to help guide your design and some ideas about how and what to harvest. These steps will lead you through three phases of strategic work and are applicable whether you are planning a single meeting or engaging in a multi-year strategic process. The three phases are:

- Inviting
- Implementing
- Structuring

Inviting

Participatory processes, whether single meetings or long term strategic interventions, require a solid invitation in order for people to show up and contribute. Because participatory processes are still a relatively unorthodox way of meeting and tackling strategic issues, invitations need to be participatory too, and they must unfold over time, inviting people specifically and in a way that engages them long before the meeting begins. The saying "The conversation begins long before the meeting starts" should guide the way you plan an invitation. It is both content and process.

The first four stepping stones are most useful in beginning the invitation process.

Need

"This is no time to engage in the luxury of cooling off or to take the tranquilizing drug of gradualism."

Martin Luther King

The need is the compelling and present reason for doing anything. Identifying the need helps to anchor an invitation. Sensing the need is the first step to designing a meeting, organizational

structure or change initiative that is relevant. Needs can be identified in a number of ways through research, dialogue, large meetings or individual sensing interviews.

Context is important.

- What time is it in the world now ?
- What time is it for our initiative now ?
- What are the challenges and opportunities we are facing ?
- Why is it important that we do this work

Harvest:

» A needs statement for the project.

» A shared understanding about why it is important to do work now.

» A clear statement of urgency or timing with which to create an invitation

Purpose

"Purpose is the invisible leader"

Mary Follet Parker

Purpose statements are clear and compelling ideas about where we are going that guide us in doing our best possible work. Discerning a shared purpose is helpful to guide work and seek outcomes, but don't get too attached. Working in a chaordic space means constantly making adjustments as you learn and create new ideas and solutions. A purpose statement should be a direction, not a necessarily a destination.

Once you have a purpose statement, continue to check in to make sure it is valid and true. Adjust it if you need to based on what you're learning as you go.

- If this work should live up to its fullest potential, what do you imagine is possible?
- What could this work do/create/inspire/result in?
- Where should we be heading?
- What are the stories we want more of?

Harvest:

» A common understanding of the basic direction for the work

» Commitment and buy in to a direction and intention for the work

» A clear statement of purpose around which to build an invitation

Principles

"Obey the principles without being bound by them"

Bruce Lee

Principles of cooperation help us to know how we will work together. It is very important that these principles be simple, co-owned and well understood. These are not principles that are platitudes or that lie on a page somewhere. They are crisp statements of how we agree to operate together so that over the long term we can sustain the relationships that make this work possible.

The best principles help to guide us when the plan breaks down, so make them observable and simple to remember.

- What key principles guide us in our work?
- What is it important to remember about how we want to work with the participants in our initiative?
- What unique ways of doing work and being together can we bring to this work?
- If the plan breaks down, what principles will guide us anyway?

Harvest:

» A shared set of principles to rely on when your work enters a complex or chaotic space and you need to reground.

» A set of commitments to one another that helps keep good work going.

Once the need and the purpose are in the place and we have agreed on our principles of cooperation, we can begin to identify the people that are involved in our work. Mapping the network helps us to see who is in this work for us and who will have an interest in what we are doing. To map the network, create a diagram with a set of three or four concentric circles.

In the centre of diagram goes your purpose statement. Place the names of your team in the first circle. This is the core team of people most fully committed to and responsible for the project.

On the second ring, place the names of individuals who are essential participants in the process, but not a part of the core team. These might be people whose expertise you need, or whose approval or political influence are required to sustain the work.

On the third ring, place the names of people who you will consult with and keep closely informed about the process. They may not have decision making authority, but not including them in meetings and gatherings will diminish the project. Finally on the fourth ring, place the names of people who will need to know what you are up to, even though they may not be directly engaged.

This scheme and process needs to be customized for your work and your project, whether you are planning a single event or a longer term strategic initiative. In general people closer to the centre will be more committed, more involved and more responsible for the outcomes.

The closer you move to the centre the more time and energy you need to spend on communications and involvement. Those towards the edges will require less intense communications - perhaps brief communication updates, or one way blasts of information. Those in the middle rings can be engaged using different types of processes that will bring them into the heart of the project on a more frequent basis.

Organizing people this way also makes it easier for people to become more or less involved in your project. For example someone on the core team who needs to step out for time or other commitments can move out to a wider ring and still be involved. they can be replaced by someone closer to the centre, who will have to do less work to get up to speed on the work of the core team..

- Who needs to be at the core of our project?
- Who do we need to talk to to make this work, and what questions do we have for them?
- Who has answers or expertise we need?
- Who has the authority to accelerate or impede this work and how can we involve them?
- Who will be affected by this work?

Harvest:

» People and commitment

» Contact lists, invitation lists, and a set of differing levels of engagement

» Communications and engagement strategies tailored for each ring of people.

Implementing

Participatory processes and chaordic work is all about getting better results. As we produce good results, we need to be conscious about the form and shape of the outputs of a process and how to support them.

In chaordic processes we cannot know the result before hand, but we can plan for the outputs and the architecture we need to put in place to support our results. Doing this before we choose the structure and processes for our initiative helps ensure that our strategic work has a life past the events we are planning.

Outputs

Whether you are planning a single meeting or an ongoing strategic initiative, it is crucial that you focus on the outputs: the concrete results of your work. While we can't know the content of emergent processes we can plan for the kinds of outputs we expect.

Depending on what you are doing you need to know if your work will result in reports, decisions, ideas, further conversations, new structures or ways of doing things. You need to make choices about how to represent these outputs in a way that is usable and appropriate for the group you are working with.

- What are the forms of harvest from our work that best serves the need?
- What intentional harvest will serve our purpose?
- What are the artefacts that will be the most powerful representations of what we have created?
- How will we make our work visible and usable?

Harvest:

» Physical artifacts that effectively share the results of the work.

Architecture of Implementation

The ongoing practice within the structures we build is important. This is the world of to do lists, conference calls and email exchanges. The invitation here is to practice working with one another in alignment with the designs we have created.

The architecture of implementation refers to what you will build to sustain the work you have created. If you are doing innovative work your organization or community will need to develop an innovative approach to sustaining it. It is critical that you make decisions about how you intend to support the outcomes of the process before you begin to undertake the substantive work of the project. While you can also rely on commitment and sustainability to be generated within the process, it is important to do some early planning to know what has the best chance of supporting outcomes.

- What resources (especially time, money and people) do we need to sustain our work together?

- What capacity and learning do we need to build to sustain this work?
- How do we leverage relationships and support the work that arises from them?
- How do we sustain and nourish our relationships and collective aspirations after the work is over?
- What commitments are we willing to make to contribute to the success of our endeavour?
- What are you willing to do differently?
- How do we end what we have started?

Harvest:

» Resources and commitments that will support the sustainability of good outcomes

Structuring

Once we have established the centre of a project by connecting a need and purpose to the people who should be involved, and we have an idea how we will support implementation, we can turn our minds to the kind of structures, processes and activities that help us address our purpose. We move through three stages of identifying a concept, investigating our limiting beliefs and then finally deciding on a project plan for moving.

Concept

As we move to a more concrete idea of what our structures are, we begin to explore the concepts that will be useful. This is a high level look at the shape of our endeavour. For example, if our need was to design a way to cross a body of water, we could choose a bridge, a causeway or a ferry. The concept is important, because it gives form to very different structures for doing our work. Coming up with a concept delays final decisions about structuring work, and it allows us to pause and check out our general direction with those who are resourcing and enabling the work. Avoid the temptation to jump immediately to a final design.

Conceptual plans are valuable because they can be used to test limiting beliefs and discover what's missing before making final decisions about how to organize the work.

- What is a good high-level approach to addressing our need and meeting our purpose?
- What basic elements, activities and exercises will best serve our purpose?
- How will we ensure that our work reflects our principles?

Harvest:

» A first draft, prototype or sketch of what the work might look like.

Limiting Beliefs

So much of what we do when we organize ourselves is based on unquestioned models of behaviour. These patterns can be helpful but they can also limit us in fulfilling our true potential. We cannot create innovation in the world using old models, approaches and ways of thinking. It pays to examine ways in which we assume work gets done in order to discover the new ways that might serve work with new results.

Engaging in this work together brings us into a co-creative working relationship, where we can help each other into new and powerful ways of working together, alleviating the fear and anxiety of the unknown. Limiting beliefs appear in both individuals and groups and so it's useful to engage in practices that work at both the individual level and the group level to surface and deal with fears, anxieties, shadows and limiting beliefs before we inadvertently build them into our plans and processes.

- What makes us tremble, and what do we fear about new ways of working together?
- Who would we be without our stories of old ways of working?
- What will it take for us to fully enter into working in new and unfamiliar ways?

- What is our own learning edge in working together?
- What are the cynics and skeptics saying about our work?

Harvest:

» Clarity and shared courage and commitment

» A naming and recognition of what might hold us back

» Clarity about how to support people b the process as they confront their own limiting beliefs.

Structure

Once the concept has been chosen and we have worked through the limiting beliefs, it is time to create the structure that will channel our resources and enable work to happen. This is where we decide upon a plan of action and define the roles and responsibilities of those involved. It is in these conversations that we make decisions and choices about the resources of the group: time, money, energy, commitment, and attention.

- What are we going to do together?
- How will we enable our work to happen?
- What resources are needed in time, money and attention and where are these going to come from?
- What will happen with the results of the work?
- What logistical questions need to be resolved?
- What expertise can help us with our work?

Harvest

» A project plan with roles, resources, activities and outcomes.

Invitation

A process

When we think of invitation, the first thing that usually comes to mind is simply a notice sent out by email or appearing on a bulletin board. Invitation as a THING.

Over the years I have come to realize that invitation is not a thing but a process, a lifestyle and a practice. When we host the call of inspiration, we do well to pay attention to how it generates the urge to invite others. Invitation is a process that brings us alive. Compared to compulsion, invitation results in people choosing to show up and being open, curious and enthusiastic. Compulsion results in closed, defensive, judgemental and apathetic participation.

In our work, developing invitations to gatherings is becoming more and more of an art. And the process starts well before the formal "invitation" is issued. As a design principle, it pays to remember that the meeting begins long before the invitation is issued.

The goal of invitation is to attract people fully to the event. So invitation begins very early on in the planning process and continues to build up to the event and beyond. Typically when I am working with a group, we follow something like this work plan:

- Work through the chaordic stepping stones and harvest the need, purpose and people. This becomes the basis for the invitation process.

- Create an invitation list of people who are needed for the meeting.

- Begin contacting these people and hosting little conversations to find out what quality of invitation would attract them to this gathering.

- As the design progress, issue small invitations to the growing list of invitees. Let them know

when the dates are chosen, where the location will be, the clarity of the need and purpose as it arises.

- Try to send out more than one invitation. The more important and deep the gathering is, the more information I like to send out before hand. With some communities, setting up a web site, blog, forum, or using social media before hand can begin the conversations before the participants arrive. The more engaged you are with the participants before the meeting, the more engagement arises in the face-to-face space.

- Don't be afraid to place barriers in the invitation: be clear about a cost to participate. This might mean a commitment of time, money or energy in order to participate. Having a barrier in your invitation results in people being able to give an authentic and intentional "yes" in order to attend.

- Within the meeting itself, frame everything as an invitation. Using language that invites people to choose to participate so they participants are aware that the quality of the experience is up to them.

- Support follow up by inviting participants to connect to one another and continue to find each other. Keep websites in place, sustain social media streams, send out follow ups and invite connection until the energy wanes and the project moves on.

It's a lot of work, but it is essential because the quality of any participatory gathering depends largely on how the participants show up. Be creative, be diligent and make sure the invitation process works well. The more attention you give to the inviting, the more intention people will give to their participation.

Choosing Participatory Methods
The art of process design

Method	Uses
Circle	Adaptable to a variety of groups, issues, and timeframes. Circle can be the process used for the duration of a gathering, particularly if the group is relatively small and time for deep reflection is a primary aim. Circle can also be used as a means for "checking in" and "checking out" or a way of making decisions together.
World Café	Process used to foster interaction and dialogue with both large and small groups. Particularly effective in surfacing the collective wisdom of large groups of diverse people. Very flexible and adapts to many different purposes – information sharing, relationship building, deep reflection exploration and action planning.
Open Space	Useful in many contexts, including strategic direction-setting, envisioning the future, conflict resolution, morale building, consultation with stakeholders, community planning, collaboration and deep learning about issues and perspectives.
Pro Action Café	An innovative collaborative methodology that helps move projects and questions to wise action. It can evoke and make visible the collective intelligence of any group, thus increasing people's capacity for effective action in pursuit of good work.
Collective Story Harvest	Enables us to deeply connect with and learn from the experience in our community, team or organization. This storytelling process builds our capacity for targeting listening and group learning. Group harvesting is an ideal way to surface the many insights, innovations and aha's that exist beneath the surface of our stories and to take learning to a deeper level.

Deeper Process Design
An introduction

The following pages will give a short introduction to how you can combine and apply some of the core methodologies in exercising leadership in a strategic organizational context.

The qualities or conditions described below support a successful implementation.

Leadership and the AoH approach described in this workbook are particularly useful when working with complexity (complex problems and situations), and, where there are no clear, unambiguous, fixed solutions, rather the context is constantly changing and you have to work flexibly with what is emerging.

To create a successful intervention you have to plan a process not an event. This means that there is a preparatory phase or process, the actual engagement process (one event or a series of events), and a follow-up process, each with some steps that need to be clarified before proceeding to the next phase or "breath".

Planning and designing an emergent process or strategy (rather than a prescriptive one) means operating in the "chaordic space". (See the chaordic path)

Designing a process in this context means creating a framework or light structure (process design) within which one can operate and produce results in an environment of self-organizing order rather than control.

The Chaordic Stepping Stones and the Chaordic Design Process offer a step-by-step approach to structuring and creating progress in this space.

A good knowledge of the methods and means available will allow you to choose the right means for the right situations.

A good process design is responding to the need in the moment, allowing yourself to be well prepared but flexible and able to respond to what is actually happening.

Fully combining and integrating content with process, each in support of the other is crucial for creating good results. A good content combined with a poor process or a good process without some real content - both fall short of the mark.

To be able to operate well in this environment one needs to embrace both the ability to work in a highly structured way as well as in a chaordic way. The 5th paradigm shows a way of organizing that combines both. (See the 5th paradigm)

AoH Process Design
Checklist for the design of processes

Before the process – meeting

Preparation (Purpose: to create focus for, and prepare for the meeting/process).

- Getting the participants' 'meaningfulnesses' on the table
- Need check
- Burning questions
- Clarify purpose-goals-and methods
- Send out an invitation with a clear purpose
- Preparation of logistics and material etc.
- Preparation of yourself as host (over prepared and under structured)
- Make the room/space yours

The Process - the meeting
1. Opening of the meeting/process

(Purpose to create a "safe space", acceptance, meaning and overview.)

- Context: "The bigger picture… the many aspects, conditions and relations, that surround a certain situation or case, and that contribute to defining the meaning to give to the situation."
- Purpose – short and long term
- Possibly a framing – set boundaries – and what are givens
- Check in – physically, mentally, and emotionally – so everyone's voice is heard, and everyone is present.
- Expectations – and hopes for outcomes
- Share meeting design/structure … or
- Create a shared agenda

2. The meeting/process

Choice of content (what) and process/method (how) in relation to purpose, target group and the desired outcome.

3. Closing the meeting/process

(Purpose: summary/wrap up, conclusion, closing)

- Review of results, decisions
- Conclusions
- Agreements
- Check-out (personal)

After the meeting/process

- Follow up (Purpose: review, learning, anchoring)
- Review of experiences and results
- Evaluation
- Learning
- Anchoring of the meeting/process
- Full stop… or beginning

'Learning Ecology'

Documentation of content and process. Purpose: to maintain and anchor common/shared knowledge, insights, agreements etc. – to feed knowledge back into the system, so it is not lost, and so it is possible to further build upon the knowledge that is already present. This is to create a shared memory.

Other possible ingredients

DISTURBANCE

It is important that there is a good amount of disturbance. The disturbance can be so small that it doesn't move anything, or really challenge, and it can be too much, so that it is rejected as too overwhelming (inspired by Maturana).

THE ABILITY TO HANDLE CHAOS – the courage to stand in chaos.

TO DARE LET GO OF CONTROL.

VARIATION – in rhythm – content – methods – process etc..

EXPERIENCE-BASED – "Tell me and I will forget – show me and I will remember – involve me and I will learn."

FROM HEAD TO FEET – personally meaningful – mentally – emotionally and action-wise

PURPOSE

It is important to let the purpose shape the meeting.

A key is to determine whether the meeting already has a determined content – does it need to have a formal structure (i.e. the group wants to agree upon or make a decision around a predetermined issue/content), or – is the purpose of the meeting to explore, inquire, develop ideas or in other ways make space for co-creation and development – in other words, let a new content emerge – have an open structure.

DIFFERENT PURPOSES:

- Show up
- Learning processes
- Idea development/innovation
- Dialogue
- Experience sharing
- To find consensus
- To build team
- Information meetings
- Planning meetings
- Distribution of tasks
- Decision making meetings
- Problem solving meeting
- Need clarification meetings
- Etc

Types of Meetings	Formal Structure	Open Structure
Creative	(Directed / 'controlled') design and planning meetings	Idea-generation meetings, brainstorming, development meetings
Learning	Education, information meetings	Interactive processes, dialogue meetings, experience sharing, etc.
Decision making Common ground	Decision making meetings	Council, etc.

Copied from InterChange's on-line resources: http:www.interchange.dk/resources/checklistfordesign/

Harvesting Plan
Making conversations visible

We aren't planning a meeting, we are planning a harvest.

Harvesting is the process of capturing or recording the output/outcome of hosted conversations. Harvesting is making meaning, telling the story and feeding forward results so they have an impact in the world.

- What do we want to get out of our work together?

- What do we want to have in our hands (the tangible: reports, photos, videos etc), and in our hearts (the intangible: new relationships, togetherness, team spirit, clarity, passion) as a result of our gathering?

- How will we gather, collect, and capture what is created, generated, and produced during the gathering?

- How will we share what is most essential?

The following questions are intended to help you think about and create a harvesting plan for a gathering you are hosting.

Harvesting Plan Flow:

1. Purpose

2. Pre-gathering activities

3. Activities during the gathering

4. Post-gathering activities

5. Feeding back into the system / to participants

6. Creating a harvesting team

Important for the following planning questions: Only collect what you need.

Don't make the group give you information you have no intention of using!

Harvesting Plan Questions

1. Purpose

What is the purpose of making visible what happened as a result of the gathering? Is it to inform, enthuse, transfer knowledge, feed into a decision process, invite reflection, invite feedback, engage in next steps, invite co-creation? What is needed? If we didn't make visible what happened at the gathering, what would be missed?

- What levels of harvesting are needed?
- Content
- Process
- Actions
- Relationships
- Questions
- Others (experience of the session, new patterns, etc)

Who is going to benefit from or be interested in what is created from the gathering? How will they use it?

What form(s) of documentation (artifacts) will best serve the purpose, need and people? What tools, media or methods will be most effective? What will be the most powerful representation of what we have created?

Think about documents, reports, newsletters, videos, video or written interviews, post-its, themes, slide shows, photography, graphic harvest, websites, social media, templates, storytelling, ezines, poetry and more…

How will we get the artifacts back to the people - how will it be shared? Email, websites, social media, print, etc. (e.g. do we need to collect name and email addresses so we can follow-up and share with them?)

2. Pre-gathering activities

Are there any pre-gathering harvesting activities that could be done?

Could others be invited into this creation? (e.g. short blog posts etc)

Could social media be leveraged before the gathering to help create online artefacts? (e.g. social media questions etc)

3. Activities during the gathering
(These need to be answered in the context of the process design)

What different harvesting activities will the participants be engaged in during the gathering? (visual templates, post-its, clustering walls etc)

What different harvesting activities will a harvesting team be engaged in during the gathering? (graphic recording, videos, pictures etc)

What will the harvesting team need that day to do their work well? (materials, support, space, etc)

4. Post-gathering harvesting

Meeting with the harvesting team: collective sense making, assembling and creating the harvest artefacts. What is needed to create the final artefacts? Anything emerge from the gathering that adjusts the harvesting plan? What did you notice? What has shifted or changed? What gave sense and meaning to you? What patterns are emerging? Metaphors? Models? Stories? Drawings? Graphics?

When could this be scheduled? Maybe a week or two post-gathering – don't want to wait too long

Who should attend?

Who will be responsible for what? (e.g. summary, documents, final videos etc)

What is the goal date to have this completed by?

5. Feeding the artifacts back into the system

How will we get the artifacts back to the participants?

- As invitation is a process, think of sharing the harvest also as a process over a period of time

What else can we do to with the artifacts to add value and move this work forward?

What other future updates could be provided to the system, and how? (e.g. updates from action champions etc)

6. Creating the harvesting team

Who will be on the harvesting team? Who should be involved with the harvesting?

- **Important: The more a harvest is co-created the more it is co-owned.** Don't just appoint a secretary, note taker or a scribe. Invite people to co-create the harvest. The answers to all the above sections provide clues as to who should be involved with the harvesting team.

What roles are needed on the harvesting team (specialties, talents, number of people etc)? Who might fill these roles?

Creating an Architecture for Implementation

Infrastructure to enable next steps + shifts

You've convened a strategic conversation using participatory processes. People have self-organized with their passion and responsibility around the issues and ideas that matter to them.

What happens next? How do we follow-up and sustain the self-organization?

Do you have the support, resources, time, technology, leadership and mentorship in place to support action? How will you keep people together? Who needs to be involved to make it happen – who enables it, who can stop it, who has access to the resources required?

It is import to create an architecture for implementation – infrastructure that will help to enable next steps and the kinds of shifts hoped for. We need a plan for keeping people together to balance work, co-learning and relationships.

Capacity building alone is not enough. We need infrastructure in place that creates the conditions for people to be able to continue to do their work in participatory ways.

What are the structures are we building to support our ongoing practice?

So much of what we do when we organize ourselves is based on unquestioned models of behaviour. These patterns can be helpful but they can also limit us in fulfilling our true potential. It is wise to explore these questions before creating the infrastructure to support next steps, as otherwise we will build structures out of our limiting beliefs instead of from new possibility and our creativity.

- What makes us tremble, and what do we fear about new ways of working together?

- Who would we be without our stories of old ways of working?

- What do we need to do to sustain our work together?

- How do we continue to build, sustain and nourish our relationships and collective aspirations/collaborative work?

- What commitments are we willing to make to contribute to the success of our endeavor?

"This of course doesn't mean that participatory processes can't have any impact. The evergreen question of 'how do you ensure follow-up?' points to the frequent failure of one-off events to create the hoped-for lasting change. In order to have any impact, a participatory process needs to be an intervention in a longer story, which is held with firm and clear intention by a group that has an enduring, high-quality and trusting relationship and a minimum level of 'consciousness development' to be able to hold the energetic 'field' of that intention stable over time. So, sustained attention/intention over time is important."

Helen Titchen Beeth,
European Commission and Art of Hosting global community of practice

Creating infrastructure to enable next steps and shifts

Here are some ideas to help you create the necessary infrastructure to support sustained action, reflection and learning.

FOLLOWING-UP ON THE CONVENING

Even the best new ideas are easily ignored, or forgotten, so support for their further development is critical to include in your plans. Even if you are not in a position to provide funding, at least consider facilitating further connection among participants who developed a new concept, and share the results of any new development with the other participants.

Ideas for following through:

- Structure your follow-up. Work to support whatever specific action participants have agreed to take at the close of the event.

- While it is tempting, avoid placing yourselves in an enforcer-like role for participants' commitments – instead hold them accountable to one another by creating forums where progress and setbacks (and learning) are visible.

- To the extent that participants are open to any continued engagement as a group, show immediate support for moving the work forward – by acting as (or providing) the technical backbone, hosting future gatherings etc.

INFRASTRUCTURE IDEAS TO ENABLE NEXT STEPS:

- If possible, make small seed grants quickly available for developing ideas that emerged.

- Put dedicated resources in place for post-convening communication and coordination and check-up on progress against any commitments.

- For champions leading experiments or new action, schedule a check-in after an appropriate period of time to provide accountability and continued support. See the sample follow-up meeting agenda below.

- Additional support for champions may include face-to-face or phone consultation with a key leader who is holding a big picture focus, and coaching calls with another resource to assist with choices of next steps in concert with the big picture. Build in interaction and regular updates with the core planning team at which updates can be offered, help can be requested and essential coordination can be arranged.

- Engage convening participants in follow-on discussions of implementation, planning and co-learning.

Ideas for maintaining engagement:

- Follow-up individually with particularly valuable participants to thank them and discuss whether they would be interested in other opportunities to engage in convenings. Maintain a database of these individuals.

- If there is a specific conversation that at least a portion of the group would like to continue, a strong moderator can sustain it on an email list, bulletin board or Facebook/LinkedIn group (or other technology).

- Many convenings are held in series, to engage different groups and address different aspects of an issue. If that is the case, give participants the option to stay up to date on what happens at later gatherings.

Follow-up meeting with experiment champions

Working in complexity, with experiments and probes, is different from a typical planning process in that the goal is to create prototypes to try out and evaluate as you go. The point is to address systemic challenges and patterns with new ways of working. There is no guarantee that these new ideas will work, so it is important to learn as you go.

A great way to follow-up, support co-learning and continued self-organization after a gathering where experiments and probes have been initiated is to invite the champions together to meet again, preferably within a month. This meeting is simple but important. Committing to meeting again to share learning and asking for help is key to sustaining change efforts. The purpose is to connect together, help re-iterate the experiments/probes, and decide what is working and what is not.

A sample agenda for a two-hour meeting might go as follows:

- **Check-in round:** What have you been up to since we last met? Harvest the information on a single sheet of paper so people can see the relationships and connections between projects. Invite participants to note where they are making headway and where they are challenged.

- **Seek patterns.** After the participants have had a detailed check-in, open up the conversation to brainstorm how projects could support each other. This may result in a series of commitments to work together, some time set aside to redesign a project or the decision to abandon a prototype altogether.

- **Make decisions.** Make decisions together that help the group continue to pursue the probes and experiments that are working.

Meeting on a regular basis allows you to continually re-iterate your portfolio of experiments, to learn and tinker with it as you go.

Inspired from Gather The Art of Convening, Art of Hosting Chaordic Stepping Stones and Idea Navigators Innovation Lab Guidebook

RESOURCES & INSPIRATION

Art of Hosting Resources

Articles

1. A Commitment to Emergence — The Inner and Outer of Evolutionary Leadership

Tenneson Woolf with Kinde Nebeker
September 2016

Emergence is a term that is used often these days, and in many fields, including the field of leadership and development. It is the phenomenon of something arising from the interaction of separate parts. OK, seemingly separate, yet really connected bits of a system. That's what many of us are learning, right? To see what our brains are trained to see as separate, but then dare to glimpse it as a whole, a system of connection that is much more dynamic and complex. It takes a commitment to see that way, doesn't it.

It turns out an Aspen tree isn't just a tree, one among many in a forest, but rather, a connected system of underground roots that occasionally pop up as, what we see as a tree beside another tree. With emergence — in this case the system of trees — what arises is not a property of the individuals, but is a property of the group. The forest is the emergence. Aha!

In the 1990s I was part of several leadership conferences offered in the beautiful Wasatch Mountains at Sundance Utah, where there are a lot of Aspens. Sundance is the resort that Robert Redford built and was original host to the Sundance Film Festival. Those conferences were on "Self-Organizing Systems," lead by my friends (and bosses at the time) Margaret Wheatley and Myron Rogers.

They were three-day gatherings with up to sixty people who wanted to learn of this selforganizing paradigm. Some were consultants. Some were internal leadership. Some were community leaders. Some were C-level in corporations. It was a beautiful place to learn, and that brought out the beauty of those people together.

One of the guest presenters at those conferences was Fritjof Capra, the Austrian Physicist, renowned for his writings (including The Tao of Physics, The Turning Point) and his work at Berkeley's Center for Ecoliteracy. Fritjof, like Meg and Myron, like many of us that have continued this work, was studying the qualities of living systems, including emergence, and applying those learnings and principles to human systems — teams, organizations, communities.

I remember Fritjof describing an example of sugar in one of his teachings — though he seemed to be thinking it out loud and coming up with the example in the moment. "Sugar is a mix of three elements: carbon, hydrogen, and oxygen, none of which are sweet." He continued, "the sweetness," he paused to peer out into that beautiful forested Sundance setting, "is in, the relationship. It is not in the parts." In making that statement, his peering outside came back to those of us inside. He'd made a discovery, which got a good chuckle from all of us — in the way that in-the-moment simplicity does.

The sweetness is in the relationship. The property of sweetness is not found in carbon by itself. Nor in hydrogen. More in oxygen. The property of sweetness, is what emerges from the interaction of these elements. Fun, right.

What does emergence mean for human systems? It means that it is important for us to not just learn about the theoretical concept of emergence, but to welcome it as a practice of seeing and a way of being. You know, like how ways of seeing make visible things that have always been there but nobody has seen — it's a forest, not just a tree. It's a community, not just a person. Like when you are

thinking of getting a red car and you start noticing all the red cars on the road. They were always there. It just feels like they came from nowhere.

Emergence is a commitment that requires practice. It is an attitude that requires dedication — like those three times per week of cardio rather than once a month. Emergence is a disposition and way of seeing that requires being willing to be surprised.

Emergence is also what is at the heart of the series that my friend and colleague, Kinde Nebeker, and I are creating and exploring through The Inner and Outer of Evolutionary Leadership. This naming itself came from an emergent process, a welcoming of surprise. In 2015, Kinde and I — who had been friends for several years — knew that we wanted to explore a next layer of work together.

Kinde is a kind and thoughtful person, just as her name suggests. She is appreciative. She has a lot of wonder in her. After spending the better part of a day together in my home, beginning to explore this work, we were asking each other what we should call it. Kinde blurted it out, "The Inner and Outer of Evolutionary Leadership." It was spoken with aha. With, "what if" and sparkles in her eye. A bit like Fritjof and his discovery about sugar.

The sweetness is in the relationship — which sometimes is people learning and wondering together. The sweet congealing of a day of sharing conversations, stories, questions — far from any planning of details — to an important and interesting "aha!"

Emergence and the Inner

From the inner, emergence is central to evolutionary leadership. It is becoming more comfortable with watching for what arises. It means letting go of some expectations. It means welcoming surprise. It means releasing ego. It means paying equal attention to the invisible that is arising as it does paying attention to charts and graphs. It means less imposing a will or option or bias so as to win. It means more willing to mix opinions and questions.

That takes a commitment, right? I do a lot of work convening people and systems together. I'm a facilitator. I help design and lead meetings so that people can be smarter together–the sweetness is in the relationship. I employ varied participative approaches to connect people to one another. Conversation is a big part of that. Dialogue. Inquiry. Pausing. Silence. These are all things that create intentional conditions in human systems for a deliberate emergence to occur. And all of them require a changed inner being, a willing inner being.

Emergence and the Outer

From the outer, emergence is about convening. It's about helping people connect in ways that interrupt norms of isolation and separation. I use many forms to help with this. The Circle Way is core and central, particularly in working with smaller groups. I use World Cafe and Open Space Technology often with larger groups. It would be easy to say that these are just dialogic methods. They are that. But what you ask of each other in those methodologies matters, and makes it a whole lot more than just methodology. Inviting people to share stories and ask questions create conditions to wander a bit together, and for a different kind of emergence to occur. Mixing people to create multiple points of contact — this creates the conditions for emergence. Emergence in human systems. Aha. Something that was not planned.

My friend and colleague Chris Corrigan has offered one of my favorite references to emergence. Chris is insightful. Smart as hell. And kind. He's really good at connecting ideas and spitting out learnings as story. His definition of emergence is concise. "It's when everyone leaves the party with something that nobody came with." Emergence comes from interaction. It's the buzz. The vibe from the party. You can't plan every encounter at a party — are you crazy. You can't script it. You can't manage it. Yes, you can set some context and general shape. Hors d'oerves around the coffee table, great! Dinner at the dining room table, great. A card game. You can plan conditions. You can't

plan outcomes. Or shouldn't trick ourselves into thinking that we can plan outcomes.

Cosmologist and spiritual teacher Brian Swimme has a response to a riddle about the creation story of earth. What happens when you mix hydrogen, carbon, oxygen and leave it for 13.8 billion years? Opera. Opera is the answer. Emergence is the explanation.

It seems to me that as we evolve as human beings — individually and collectively — many of us are learning that our willingness to welcome emergence is a very important skill and disposition. To see what was once thought separate, and reintegrate not just what we see, but what we are inside. That's commitment. That's an evolution. And we might just surprise ourselves with more sweet opera.

Tenneson Woolf (tennesonwoolf.com) and Kinde Nebeker (newmoonritesofpassage.com) are long-time friends that have become colleagues, drawn to each others work and interests. Together they are exploring many aspects of evolutionary leadership, including the practices for the inner and the outer. They offer workshops and presentations, that invite attention to emergence, and the sweetness of relationships that creates it Copyright © 2016

2. Leadership at 50 -- Three Questions for Recovering Tenacious Leaders

Tenneson Woolf with Glen Lauder
February 2015

Thirty-five years ago, in my teen and young adult life, if I ever thought of myself as a leader it was because of my tenacity. In sports. I played ice hockey for many years. In my first part-time job, working at a grocery store. In helping my mom and grandparents with household chores. In school. My job, as I saw it, was to try hard. Harder than anyone else. To endure. That's how I could be a good example. That's how I could prove myself. My job was to try hard at being smarter and more clever.

I was very competitive, sometimes besting others who were more talented than me. I didn't know then how transparent my insecurities embedded in such competitiveness likely were. But I remained defaulted to tenacity. Effort. Effort. Effort. It had a satisfying buzz to it.

Leadership as tenacity stayed with me in my twenties and thirties into the life experiences of missionary service abroad, university degrees in psychology and organizational behavior, the first stages of my career in leadership development, marriage, and raising a daughter and son. Hard work remained crucial to me, particularly when centered in values. Family, community, integrity, and seeing a bigger picture guided my efforts of leadership that was tenacity. Doing more, moving

faster, squeezing more into the moments of a day, and staying up until 1:00 or 2:00 to accomplish what I felt I had to -- these were all common. They fit the story.

In my forties, this story started to crack. I'm a bit embarrassed to say that it took so long, but it is what it is. My forties took me into next stages of my career, starting a consulting business, raising kids that were now teenagers, adopting a newborn child, and later, divorce. My forties were were an opening to uncertainties, grey areas, and searching for other ways. Effort and tenacity were important, but were beginning to not be the game. Respected as it was, leadership required something different. At minimum, in personal life and in professional life, the ability to pause and reflect became a keen marker of leadership.

Now, here I am, it seems in a blink, in my 50s. I carry this life history with me. It remains a buzz to work hard, to work up a sweat every now and then. However, leadership -- me in relation with clients, community, and family -- now requires a changed orientation.

Leadership is no longer from "more." Nor from faster, and more efficient." Leadership is from "less." From more clear, and a disposition of stripping back, spaciousness, and central stillness.

These aren't the only qualities, of course, but they are the ones that feel surprisingly more helpful. More fruitful. It is less good soldiering forward, and being a good "doer." It is more pausing. More grounding amidst the complexity that is life.

In this realm, my friend Glen Lauder, a Scottish man living the last 45 years in New Zealand, is such a teacher to me. We have been meeting quite regularly over the last decade to share, virtually and in-person, experiences in life and leadership. We talk. We describe what has our respective attentions. We listen.

From a recent exchange, Glen remarked, "A day doesn't have to hurry to be a day." I chuckled out loud when he said it, a laugh that comes when a truth is spoken so simply and accurately. "A day just is. It can't be anything other than what it is." Clock time, this amazing human construct that so often governs every aspect of our lives -- or inspires, or enslaves -- is only time.

A day is just a day. Varied in length depending on the season and one's position on the planet, but it remains only one spin of the earth in one annual rotation around the sun. A day is inherently and coherently itself, without trying.

Glen gets me curious and wondering, one of the things that good friends do. As I am now in my 50s, I wonder, what is inherently and coherently me? It is a question for all of us really, and at many ages, but particularly poignant at 50. What qualities have patterned across the decades? Like the day, what is it that I, or you, can't not be?

These questions are life-long questions that if one takes seriously, will likely involve significant personal reflection, and be asked with friends, colleagues, and even spiritual directors.

The 50s is a time to reexamine leadership assumptions and practices. It is a time to notice what we can contribute now that we could not before. What we can contribute to others in different stages of leadership. It is a time when "legacy" begins asking for attention.

For me, tenacity is no longer the way to offer the best of what I am. I'm glad to be with people who can offer their tenacity. But for me, leadership is no longer about a default of trying harder. It is about being clear. Stripping back nonessentials, creating ample spaciousness, and discovering a central stillness. It is presence, an ability to show up with self and with others, that has become the core competency.

So, I find myself asking these three questions as essential to the leadership paradigm that is the 50s.

1. What stripping back do you need?

When I was in my thirties I refinished an old kitchen table. The table had white pillar legs that were significantly chipped and scratched. The varnish covering the oak table top was warn and gouged in several places.

Refinishing this table meant stripping back the paint and the varnish. It meant sanding back the finished surfaces. Many times. Dusting them off. Checking again to see if I'd stripped it far enough. Doing it again to get down to the wood itself. It took more time than I would have imagined. And patience. But the unfinished, exposed wood was beautiful.

1. *What stripping back do you need?*
2. *What spaciousness do you require?*
3. *What central stillness is yours to fulfill?*

In contemporary leadership, many of us have todo lists that are rather grand and large. We too have layers to strip back. I don't know many people that aren't involved regularly in leadership triage, needing to discern in an instant priorities that require action and good things that must wait for another day.

For many, our busyness includes an overloaded email inbox, what a friend once described to me as "someone else's todo list for you." Multiple projects. Multiple relations in multiple networks of people in multiple timelines. In our 24/7 virtual access to one another many are expected to be available and on call. Always. That kind of

lifestyle requires a deliberate choice of stripping back. Perhaps saying no to good things. A kind of stripping back to the essential beauty in the wood itself, the wood that is us.

2. What spaciousness do you require?

A couple years back, I started scheduling empty space in my calendar. Appointments with myself. Each Monday, I blocked out the morning. I protected time. I dared to claim some spaciousness.

I knew it would not happen every Monday. But I still scheduled it to repeat indefinitely. I needed a deliberate step to interrupt the pattern of always feeling that my life was over-booked. I needed to feel that there was room to breath. For me, to meditate. To be quiet. To welcome life to integrate within me. To deliberately let my focus on projects rest. It wasn't time to do the laundry or catch up on tasks. It wasn't time to sneak away to focus on projects. Those Mondays were times to deliberately empty myself.

What became immediately clear to me in my Monday mornings was that this step of creating spaciousness, was not about laziness or escape. There is again, right. Tenacity beckoning! Always near, like an overly enthusiastic personal trainer demanding ten more pushups from me. Creating spaciousness was about getting further below the surface of things. Further into the rich and vibrant resources in the center of who I am.

Not everything is meant to be a three-minute speed date or a two minute report. Admittedly, I enjoy being able to do those things. But they don't get to enough of the juice for me. What does is a walk in the morning or evening. Removed from noise of what can be an incessant world. A return to self, and interestingly, productivity, that is accessed only by spaciousness.

3. What central stillness is yours to fulfill?

When Glen talks about central stillness, he speaks of fulfilling it. Not fabricating something. Not masquerading as yet another facsimile of inner self. Central stillness is about essence, the day that does not have to try to be a day. The core that just is.

You know those times when you do something that is completely natural to you, yet others perceive it as miraculous. Perhaps it is the remark that you made in a meeting that nobody else was willing to say. Or that question that you asked when others were too shy to do so. Perhaps it is your prolonged commitment to a project that others had given up on. Perhaps it is the story you share of yourself that shows your vulnerability and willingness to be transparent. Others look at you like you've just turned into a super hero. Yet it was just natural to you. In fact, you might even be confused by the flattery. You were just being you. You were just doing what you couldn't not do. This is a central stillness.

Central stillness takes humility. It is a way of being. Less of a show put on for someone else to hide all of your imperfections. More of an unexaggerated quality of being. Central stillness takes boldness. More being clear on what is true and essential for you. Less bombastic grandstanding for the sake of selling somebody else's message.

Central stillness evokes transparency. Willingness to be open to those around you and to require it of them also. Central stillness is vulnerability, acknowledging that you aren't perfect, just like everyone else. Central stillness is not hiding your talents. It is standing in them fully with clarity, being who and how you are.

I love American Poet, Mary Oliver's words on this, in her poem, "On Meditating, Sort Of." Most of us benefit from the reminder, "how wonderful to be who I am."

Meditation, so I've heard, is best accomplished
if you entertain a certain strict posture.
Frankly, I prefer just to lounge under a tree.
So why should I think I could ever be successful?
Some days I fall asleep, or land in that
even better place — half asleep — where the world,
spring, summer, autumn, winter –
flies through my mind in its

hardy ascent and its uncompromising descent.
So I just lie like that, while distance and time
reveal their true attitudes: they never
heard of me, and never will, or ever need to.
Of course I wake up finally
thinking, how wonderful to be who I am,
made out of earth and water,
my own thoughts, my own fingerprints –
all that glorious, temporary stuff.

I loved playing ice hockey as a kid. I loved pretending I was Bobby Orr or Phil Esposito, my Boston Bruin heroes. I loved endlessly taking shots with a tennis ball against the basement wall. Most of us have something like this from our childhood and younger days. I loved trying hard. I still do. But in my 50s, my tenacity, perhaps now shape-shifted into discernment, requires expression through other choices. The wood, stripped back beneath its several coatings, is as it was for my table, rather impressive.

3. People Everywhere, In These Times

Tenneson Woolf

There is a Zen saying that inspires me. "Everything changes. Everything is connected. Pay attention." That's it. Seven words that hold volumes of wisdom and invitation. They are powerful in their simplicity.

Perhaps you relate. Perhaps you too have stories of how everything changes. In your personal life -- in your relationships, in your job, where you live. In your community -- people coming, people going, groups that can't find their way through conflict, groups longing to make a difference together. Perhaps you relate to everything changing in the world.

It is a common human desire to make sense of change. Most of us know that everything is connected. Not being able to make sense of it all, particularly from our well-trained linear minds, doesn't mean we are without capacity and instinct to recognize deeper connections and webs that string life together. Our bodies and our spirits know things that our brains can't know.

And so it is, that we gather, as friends, to remember our story together and a few key anchors in that story:

PEOPLE EVERYWHERE YEARN FOR CONNECTION.

They yearn for belonging. Have you noticed this? Most people know that they belong to a larger kind of family. Blood lines, yes. But also beyond. The neighborhood. The committee. Some see it bigger. The human family. The family of living things. The family that is the universe. I believe humans are are coded for connection, predisposed to seek friendship and kinship. Even to seek difference, because it is interesting. I believe we know this coding from our bellies and from our hearts. Yet the world, currently, in many ways, is not structured for those deep connections to occur. Rather, for centuries, we have structured isolation and separation as building block of contemporary society.

PEOPLE EVERYWHERE YEARN FOR FRIENDSHIP.

Not the kind of friendship that is watching the basketball game together. There it that too, and it has its place. But I'm talking about a different kind of friendship. One that involves radical truth-telling to ourselves and to one another. It is radical vulnerability. A willingness to lean into shame, or doubt, or embarrassment and realize that these experiences are not isolated,

but widely shared. We lean in to life's evolution together. To be in unknowns together. It is not more surface friendship that people are hungry for. Not friendship that is more appearance and production. The hunger is for more that is stripped back to a center. More that is from less. More that is from the simple core of who we are.

People everywhere yearn for presence.

Presence is a "core competency," language more commonly used in a business setting. Yet its meaning is widely known. An ability that is essential, a skill that is at the crux, a muscular memory central to accomplishing purpose. Like flour is to bread. Like kneading is to preparing it. Core competencies are very utilitarian. They help us get things done. They are things, or steps, that we wouldn't, or couldn't, live without. In professional life. In communal life. In the often fast paced, hyper-connected, ever-changing world, presence, perhaps more now that ever, is most needed. We cultivate it together.

People everywhere yearn for community.

Yet community takes discipline, doesn't it. It takes discipline to share ideas. It takes discipline to create a center, a shared purpose and imagination together, and return to it often. It takes discipline to work through difficulty without collapsing to embarrassingly conciliatory and discouraging consciousness. It takes discipline to find the simple and to stay with it. To not just please each other. To not just fight because it's the easiest thing to do.

So humans gather. To lament. To laugh. To share fears. To reify dreams. To restore memory. To witness together. Most of us know that it is a time to pay attention. We are simply remembering that we do this best together, with friends.

In These Times, Friends Matter

In these times
*   friends matter,*
* the people we turn to.*
*   To listen.*
*   To be heard by.*
*   To be seen by.*
*   To see.*
*   To love.*
*   To be loved.*
In these times
*   staying awake matters.*
*   Interrupting the many seductions*
*   of numbness.*
*   It takes discipline, doesn't it.*
In these times
*   dwelling in complexity matters.*
*   Old fixes don't work.*
*   Imposing them more loudly doesn't work.*
*   Waiting.*
*   Listening.*
*   Looking for patterns does.*
*   Welcoming surprise*
*   and union with life itself.*
In these times
*   presence is core competency.*
*   It is the core competency.*
*   We grow it together,*
*   telling stories,*
*   and asking questions.*
What matters to you?
*   What is it like to be you?*
*   What has your attention?*
*   Sometimes even,*
*   What makes sense for us to do now?*
In these times
*   friends matter.*
*   Turn, and turn, and turn again*
*   to one another.*

Our Team

CHRIS CORRIGAN is a teacher and facilitator of strategic conversations and a practitioner of the Art of Hosting whose work invites collective intelligence and collective leadership to be activated in the service of complex challenges. Chris has worked locally and internationally in a huge variety of contexts including social services, indigenous community development, immigration and refugee issues, business, government, food systems and education. He has written and contributed to influential books on the role of participatory processes in activating new forms of leadership and community development. His well known weblog, Parking Lot, has charted his own learning in the field since 2002. He specializes in Open Space Technology, and design for large scale initiatives to work in high levels of complexity. He is a poet and a musician. www.chriscorrigan.com

CAITLIN FROST is a skilled facilitator and coach working with individuals and groups worldwide to open more space for possibility in themselves, their teams, organizations and communities. Her coaching work focuses on transforming limiting beliefs and mindset to increase our personal and collective capacity for wise, clear and creative thinking and action in the face of uncertainty, challenge and change. She is a deep practitioner and Certified Facilitator of The Work, and hosts trainings globally in community, higher education and corporate spaces and online. She is Steward in the Art of Hosting international community of practice, core faculty in the innovative Leadership 2020 Program in Canada and a partner in Harvest Moon Consultants. Caitlin is also a gifted improviser and uses improvisational theatre in her work with leadership coaching. www.caitlinfrost.ca

TENNESON WOOLF is a facilitator, workshop leader, speaker, and writer. He posts a daily blog, Human to Human, in which he offers reflection on varied aspects of participative leadership practices, insights, and human to human depth. Tenneson's work with change and dialogue over the last 20+ years has been to design and lead meetings in participative formats. From strategic visioning with boards to large conference design. He has worked within a university, helping to direct an institute for leading change. He has worked independently and internationally, most recently in Australia to support practice of The Circle Way. Lately he has been working with faith communities, educators, and next generation leaders. Tenneson's lineages include 1) The Berkana Institute, working with pioneer and thought leader, Margaret Wheatley, 2) The Circle Way, for which he is currently serving as board chair, and 3) The Art of Hosting, which has since it's inception, shaped him and his work. www.tennesonwoolf.com

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Chris Corrigan	www.chriscorrigan.com
Caitlin Frost	www.caitlinfrost.ca
Teresa Posakony	www.emergingwisdom.net
Amanda Fenton	www.amandafenton.com
Tenneson Woolf	www.tennesonwoolf.com
The Circle Way	www.thecircleway.net
The World Café	www.theworldcafe.com
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Notes

There is no greater power than a community discovering what it cares about.

Ask "What's possible?" not "What's wrong?" Keep asking.

Notice what you care about.
Assume that many others share your dreams.

Be brave enough to start a conversation that matters.

Talk to people you know.
Talk to people you don't know.
Talk to people you never talk to.

Be intrigued by the differences you hear.
Expect to be surprised.
Treasure curiosity more than certainty.

Invite in everybody who cares to work on what's possible.
Acknowledge that everyone is an expert in something.
Know that creative solutions come from new connections.

Remember, you don't fear people who's story you know.
Real listening always brings people closer together.

Trust that meaningful conversations change your world.

Rely on human goodness. Stay together.

Margaret Wheatley,
Turning to One Another