The Art of Hosting:

**Accountable Communities for Health Peer Learning Lab**

We live and work in increasingly complex times. The Art of Hosting Conversations that Matter is a set of patterns and practices for addressing complexity. It asks us to be curious and nonjudgemental and invites generosity of spirit and actions. It believes conversation matters and that good conversation leads to wise action generating different results.

**Social Innovation** is the generation of new ideas that work to resolve existing social, cultural, economic and environmental challenges for the benefit of people and planet. True Social Innovation is systems changing. We can’t do it alone.

A new set of leadership skills is being cultivated. Skills that tune into and are responsive to ambiguity and emergent circumstances, that foster generative conversations where perspectives can collide to spark new ways of thinking. Skills that invite engagement in whole new ways - in our communities, systems, organizations and teams. tapping into collective wisdom, knowledge and intelligence inherent in any group, any system, any community.

What happens when we come together in co-learning and co-creation to create health with and for our communities?
Our Vision and Mission

_Is to support in the development of a Community of Practice across the State of Vermont, responding adaptively and systemically to the needs of each community being served._

_This Workbook is a gift from the Art of Hosting and Harvesting Conversations that Matter to support ACHs in co-learning and co-creation so that each of you may host systemic systemic change for a healthier world._
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Welcome*

Human beings have enormous untapped resilience and sustainable solutions lie within the wisdom between us. These assumptions and experiences are what this learning experience is based on. In the current climate, tapping into the potential held in organization, communities and systems is crucial. Inviting everyone to participate with their diverse perspectives is a key to releasing this potential. This is an essential skill and competence in exercising leadership that engages others.

The Art of Hosting Conversations That Matter is a body of knowledge and it is a way of being. It is a global community that learns together through the impact we have on shifting the shape of the world. It is a constantly emerging, co-creative field of practice from which naturally flows the desire and impetus to host in collaborative teams, recognizing the power and support available in bringing together the diversity that is in a community, organization or system.

We are so pleased to welcome you and invite you into a sense of community during our time here together. We are co-learners. Your host team has a vast array of experience to share and we know each of you do as well. We look forward to seeing the wisdom, knowledge and cool stuff that will emerge as we listen together for new emergence and new knowledge in the Art of Hosting Conversations that Matter: Fostering the Conditions for Social Innovation and Community Engagement.

This Resource Book

The frameworks and patterns contained in this resource book build on the experiences harvested in an international network of practitioners who share a common practice based on what is known as The Art of Hosting Conversations that Matter (AoH). AoH is both a network of practitioners and a way of working focusing on the transition from strategic conversations to wise action and systemic change.

This resource book is intended to be a personal reference journal, to help you remember, focus and deepen your learning. It shares the basic assumptions and understanding of the Art of Hosting practice. It includes several tools and practices that the community of practitioners has found simple and helpful. They are for you to use, improve and share.

“Look for small steps of things you can do together with people with whom you traditionally would never have cooperated — and do something useful, no matter how small.” Peter Senge
Why Social Innovation and Community Engagement?

New Solutions are Needed

Whether in corporations, government, education, non-profits, communities or families, community engagement and social innovation are built on the assumption and experience that an increasing complexity in the problems we face compels us to find new solutions for the common good. These solutions are more comprehensive and more readily found and owned if they are co-created by stakeholders.

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 (the chaordic path). It is in the chaordic space that new connections are created and new possibilities emerge. The way to any major change or transformation will go through chaos into new order.

Conversations Matter

It is common sense to bring more people together in conversation. It is the way we have done it in generations past, gathering around fires and sitting in circles. Conversation is the way we think and make meaning together. It is the way we build strong relationships that invite real collaboration.

Meaningful Conversations Lead to Wise Actions

Human beings who are involved and invited to work together pay attention to that which is meaningful to them. Conversations that surface a shared clarity on issues of importance foster engagement and responsibility when ideas and solutions must be put into action — actions that come out of collective clarity are sustainable.

Organizations Are Living Systems

When human beings join together in an enterprise or organization, they have more in common with a living system than with a machine. Living systems are intelligent and capable of self organizing their own and unique solutions. The way one “leads” a living system is radically different from operating a machine.

“Leadership in complexity requires different skills than traditional models of leadership. It requires us to think of leadership as inquiry, and this in turn means that we need to think much more critically about the kinds of questions that we ask. It may not be the answers that need changing, but the questions.”

- Brenda Zimmerman
Leadership focused on social innovation and engagement 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 a natural hierarchy is the result. These four levels operate as characteristics of a whole and not as a linear path.

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| • To connect to our own motivation and reason for choosing a different way of leading  
• To strengthen our individual courage to lead as hosts | • To train the competencies of collective reflection and wise action  
• To practice co-creating, co-deciding and co-hosting strategic meetings, focus groups, community conversations, etc. | • To experience working in unity with other leaders  
• To experience new organizational forms and work at cocreating relationships, which serve the needs of our organization or community | • To integrate the bigger context in all our actions and make it part of ourselves  
• To benefit from knowledge and experience of a global network of practitioners and learners in this field |
World View as a Lens*

Our worldviews, made up of our values, beliefs, assumptions, attitudes and ideas, impact everything from how we understand the nature of reality to how we respond to the environment around us. Each person’s worldview influences their goals and desires, consciously and unconsciously shaping perceptions, motivations and values.

The convergence of our individual characteristics and our unique history, including our life experiences, region, culture, religion, socioeconomic status and family are expressed through our worldview. Our worldviews inform and affect our individual realities and the actions we take in the world. There is an infinite multiplicity of worldviews and more than one “right” way or perspective. Each of us has our own unique worldview.

We are each part of a complex, ever-changing, interconnected, living universe. What we do influences the world around us, and the world around us influences us, even when we are not aware of exactly how. Greater understanding of the interdependence of all life leads to a more complete view of reality.

For three hundred years, since Descartes and Newton, our thinking has predominantly been influenced by rationalism. We have been able to figure things out and “be in control.” We tend to view our organizations 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 organizations were also viewed as adaptive or 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. These are not just simple systems, but include highly complex systems with incredible results. For example, termite nests even have air conditioning so the temperature stays the same inside the hill.

There are several exciting phenomena in nature and living systems that can also apply to human systems:

1) Nature has the capability to organize around a purpose through self-organization, it does not require someone specific to direct the organization instead all who are involved participate in what is needed to achieve the purpose

2) Self-organization can lead to emergence, such as results that could not be predicted and that create totally new properties and qualities or something totally new and surprising (1+1 could equal 11)

Shared by Jerry Nagel

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?
Qualities of living systems:

• A living system accepts only its own solutions — we only support those things we are part of creating

• A living system pays attention only to that which is meaningful to it here and now

• In nature, a living system participates in the development of its neighbor — 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 a question of survival of the fittest — but everything that is fit — as many species as possible. Diversity increases our chance of survival.

• Experimentation opens up to what is possible here and now. Nature is not intent on finding perfect solutions, but workable solutions. “Life is intent on finding what works, not what is right.”

• All the answers do not exist “out there” — we must sometimes experiment to find out what works

• A living system cannot be steered or controlled — it can only be teased, nudged, titillated to see things differently

• A system changes when its perception of itself changes

• Who we are together is always different and more than whom we are alone. Our range of creative expression increases as we join with others. New relationships create new capacities.

• We (human beings) are capable of self-organizing, given the right conditions
Complex Adaptive Systems

The way we lead is very much formed by how we perceive reality. Social reality has become an object of systems research and cognitive science, which in turn offers us the whole range of realities that makes up our actual reality. In what follows we introduce the notion of a system to understand social reality. A system is the whole of its elements and their relationships as well as its rules of behavior or processes. You may wonder where the borders of a system are. If the elements of a system include living beings like humans or nature, then it tends to be dynamic and may move its borders; it actually defines them by its own rules.

A highly instructive synopsis on the various states of systems found in the “Cynefin framework” developed by the Welsh researcher Dave Snowden distinguishes five domains of reality that a given system may represent.

The first four domains are:

**Simple**, 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. This is the area we know from the assembly line factory, work and environment constrain any actor so much that they are left with few options and perform as the system instructs them to do.

**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. This is the area of the "expert" that knows better than the actors how the system's relationships actually fit best together. The experts design the way to follow, and sound managers implement this advice. It is important to note that in the “complicated” domain there are linear cause-effect relationships, but there are so many and not all obvious that some expert insight is necessary to find a good way through.

**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 the system's relationships are mutually influenced by the actors' behavior. Thus, it is impossible to discern casual relationships in advance, and experts fail as anyone else in trying so.
Leading in complexity is a game of trial and learning. The art is to launch a number of different possible actions together and see what works better. Those are then amplified and the ones that work less well might be stopped or revised. Here we work on the basis that we know that we do not know the best way in advance. Chaotic, in which there is no relationship between cause and effect at systems level,

Chaotic, in which there is no relationship between cause and effect at systems level, the approach is to Act - Sense - Respond, and we can discover novel practice. Leading in Chaos is stressful as the whole system is in stress mode. Systems tend to be unstable and fall from chaotic into simple. This is a catastrophic collapse, as the simplification brought into the system tends to overdo and to suppress the inherent complexity, the system might re-collapse back into chaos again.

The way to stabilize chaotic situations is by Acting - Sensing - acting at large scale at once )there is no time left for trying), until the chaos stabilizes into “normal” complexity where further actions can be tested.

Disorder is the fifth domain which is the state of not knowing what time of causality exists, in which state people will revert to their own comfort zone in making a decision.

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

The new perspective gained by this is the view from complexity. Leading in complexity is actually simple - it suffices to maintain a number of high-quality learning nodes around constant experiments about what could be a new or improved way of acting in the face of constantly fresh constellations in a world where all actors have some large degree of freedom constrained lightly through boundaries and rules of the system.

References:

http://en.wikipedia.org/wiki/Cynefin
http://www.youtube.com/watch?v=5mqNcs8mp74 (brief explanation of the Cynefin framework)
http://www.youtube.com/watch?v=Mlw82eZaJg (how you organize a birthday party for 13-year-old boys using the various domains of systems)

The universe is more than a set of all beings and existent energies, it is the set of relationships that involves all beings and make them interdependent. Leonardo Boff
Definition: The act or power of seeing.

A vision statement is sometimes called a picture of your organization in the future but it’s so much more than that.

Your vision statement is your inspiration, the framework for all your strategic planning.

A vision statement may apply to an entire company or to a single division of the company. Whether for all or part of an organization, the vision statement answers the question, “Where do we want to go?”

What you are doing when creating a vision statement is articulating your dreams and hopes for your business.

It reminds you of what you are trying to build.

“It is not what the vision is; it is what it does that is important.” — Peter Senge

PURPOSE - Why are we all here collectively?

Definition: A statement of purpose defines, with absolute clarity and deep conviction, the purpose of the community/organization.

An effective statement of purpose will be a clear, commonly understood statement that identifies and binds the community together as worthy of pursuit.

When properly done, it can usually be expressed in a single sentence.

Participants will say about the purpose, “If we could achieve that, my life would have meaning.” — Dee Hock
The Four-Fold Practice*

There are four basic practices that are key to the Collaborative Leadership and the Art of Hosting. 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. To Be Present (Pre-Sensing)

Being present means to show up, to not have distraction, to be prepared, to be clear about the need and to understand 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 work 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, impacts on 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, a process of “checking-in” to the subject matter or task at hand by hearing everyone’s voice in the matter or even taking a moment of silence.

Invite a collective slowing down so that all participants in a meeting can be present together.
2. Practice Conversations (Participating)

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 do not live well 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 the clarity to arise. The art of conversation is the art of slowing down to speed up.

3. Hosting Conversations (Contributing)

Hosting conversations 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 eight helpers (see further down) as starting points, and although you can also do this in the moment, the more prepared you are the better. The best preparation is being fully present.

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 your 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. Community of Practitioners (Co-Creating)

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 between us — what is arising as a result of our collaboration. It is not about the balancing of individual agendas; it is about finding out what is new, in particular collectively. And when that is discovered, work unfolds beautifully as 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 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, especially in complex situations where multi-layered challenges need to be met simultaneously.
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 conversation and connect with other hosts or practitioners, 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” — where we really enter the collective intelligence — we multiply our capacity and enter the field of emergence.

“You can have a group of individually intelligent people — but until that group knows what it knows together — the group as a group is not intelligent.”

— inspired by Peter Senge
Chaos – Order – Control are different states of being and experiencing. We tend to feel safest in the state of order, or for some people, in control. Being out of control is scary if we are looking for predictability. If we have a mechanistic view on organizations, our tendency will be to stay within the realms of order and control, where things are predictable and stable — and where we produce status quo or “more of the same” — which in some cases is exactly what is needed.

The world and times we live in are, however, neither predictable nor stable and call for more flexibility as “more of the same” solutions are not meeting the challenges. If we are looking for innovative, new solutions, we will find them in a place between chaos and order — the chaordic path.

The chaordic path is actually the story of our natural world — form arises out of nonlinear, 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.

In nature, so too in organizations, the path between Chaos and Order leads us to the new — to collective learning and 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.

To lead our organization on the chaordic path, we need “chaordic confidence,” to have the courage to stay in the dance of order and chaos long enough to support generative emergence that allows the new, collective intelligence and wise action processes to occur.
As we tread the line between chaos and order, individually and collectively, we move through confusion and conflict toward clarity. It is in the phase of not knowing, before we reach new clarity, that the temptation to rush for certainty or grab for control is strongest. We are all called to walk this path with open minds and some confidence if we want to reach something wholly new.

In this space of emergence, we leave our collective encounters with something that not one of us individually brought into the room.

The art is to stay in the fine balance between chaos and order. Straying too far to either side is counterproductive. On the far side of chaos is chamos, or destructive chaos, where everything disintegrates and dies. On the far side of order is stifling control, where there is no movement, which eventually means death. When we move toward either of these extremes, the result is apathy or rebellion, the very opposite of chaordic confidence. Staying on the chaordic path is where the balance is and where life thrives.

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 strategy 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 (Ex. landing an airplane safely, operating on a patient, etc.). Therefore, it is where predictability is called for and where procedures and
In the divergent phase, or “Pre-ject,” there is no clear goal. This is the “goalseeking” 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 when a goal is seen collectively.

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, summarizing 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.

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**Divergence and Convergence**

In entering into an inquiry or multi-stakeholder conversation, we operate with three different phases in the process — divergence, emergence and convergence. 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 three phases of divergence, emergence and convergence are different ways of thinking and working that are complementary. These can also be seen as the three phases of breathing — in breath, (lungs expanding/diverging) pause, out breath (lungs contracting/converging). The “breath” of divergence and convergence — of breathing in and breathing out — is at the heart of designing process. Every process goes through several such breathing cycles.

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Over the millennia, human beings have developed many different ways of organizing together. Each new age of civilization has its signature form of organization. One of the questions that the Art of Hosting community of practice is continually asking itself is “What are the organizational concepts that we can develop together that are actually good for us and are good for this time?”

**Circle/Council - Nomadic Age**
As nomads, we lived in small groups. As soon as fire was discovered, humans began sitting in circle. It is 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 - Agricultural Age**
As we stopped our nomadic wandering and settled in one place, we developed agriculture. Our communities grew bigger, and the clergy (for ritual) and the warrior or soldier (for protection) classes emerged. We began to develop hierarchies and organized in levels,” where one person or group of people had power over others. The triangular form of hierarchy is very useful for action, for getting things done. Purpose is held at the top level.

**Bureaucracy - Industrial Age**
Simple hierarchies are extremely unstable in the face of the unexpected. The industrial age brought change and more complexity. Bureaucracy became the predominant organizational model, bringing in the specialization of functions horizontally with each specialized division acting as hierarchies, which controlled vertically. Together, divisions managed much greater complexity than either could do alone. Bureaucracy is best suited for creating stability, optimizing efficiency and maintaining the status quo, and for managing complex situations to a certain degree. However, as complexity and speed grow, the bureaucracy is not agile enough to respond quickly since this form usually operates as silos that, when needed to interact together, struggle to do so. Bureaucracy typically moves slowly in the face of change. Purpose in the bureaucracy is also held at the top of each division.

**Networks - Information Age**
A more recent organizational form (first described in the 70s), networks emerged in the information/communication age, as a response to a need to organize and reorganize quickly and flexibly. Networks are collections of individuals, circles (small groups) or triangles (hierarchies) — nodes that are connected together. Networks can link all types of organizations. We rarely find networked collections of bureaucracies, but networks can and often do spring up inside them — especially informally. Networks are great for relationship, flexibility and innovation, and for getting things done fast. The connection is guided by individual purpose harmonizing with a collective purpose. The different nodes are connected together because their respective purposes need each other. Once the need is no longer there, the network connection will most often lapse.
The following pages will give a short introduction to some of the core methodologies that are good practice in community engagement. They are designed to engage a group of people (large or small) in strategic conversations where our collective wisdom and intelligence can be surfaced in service to finding the best solutions for a common purpose.

There are some basic **principles or qualities** that are common to all these methodologies:

- 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 usually **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 (Ex. circle practice) or used as many smaller conversation circles, woven into a bigger conversation (Ex. World Café, Open Space)
- Meeting in a circle is a **meeting of equals**. 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 following four-fold practice: 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 in 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 (see also the section on design).
Circle Practice*

The circle, or council, is an ancient form of meeting that has gathered human beings into respectful conversations for thousands of years. In some areas of the world this tradition remains intact, but in some societies it has been all but forgotten. PeerSpirit circling is a modern methodology that calls on this tradition and helps people gather in conversations that fulfill their potential for dialogue, replenishment and wisdom-based change.

What is Circle Good For?
One of the beautiful things about circle is its adaptability 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, particularly for decisions based on consensus. Be creative with the circle and be ready for the deep wisdom it can unearth!

Principles of circle:
- Rotate leadership
- Take responsibility
- Have a higher purpose that you gather around

Four Agreements of Circle:
- Listen without judgment (slow down and listen)
- Whatever is said in circle stays in circle
- Offer what you can and ask for what you need
- Silence is also part of the conversation

General Flow of Circle:
- Intention
- Welcome/start-point
- Center and check-in/greeting
- Agreements
- Three principles and three practices (see above)
- Guardian of the process
- Check-out and farewell
- Tend to the well-being of the group: Remain aware of the impact of our contributions

Intention shapes the circle and determines who will come, how long the circle will meet and what kinds of outcomes are to be expected. Additionally, the center of a circle usually holds a focus that can be supported by placing the question in the center or objects that represent the intention of the circle.

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.

To aid self-governance and bring the circle back to intention, having a circle member volunteer to take the role of guardian is helpful. This group member watches and safeguards the group’s energy and observes the group’s process.

Closing the circle by checking out provides a formal end to the meeting and a chance for members to reflect on what has transpired.
Appreciative Inquiry*

Appreciative inquiry is a strategy for intentional change that identifies the best of “what is” to pursue dreams and possibilities of “what could be”; a cooperative search for strengths, passions and life-giving forces that are found within every system and that hold potential for inspired, positive change. (Cooperrider & Srivastva, 1987)

Assumptions
• In every community something works
• What we focus on becomes our reality
• Reality is created in the moment — there is more than one reality
• The act of asking questions influences the community in some way
• People have more confidence and comfort to journey into the future when they carry forward parts of the past
• If we carry forward parts of the past, they should be what is best
• It is important to value differences
• The language we use creates our reality

What is Appreciative Inquiry Really Good For?
Appreciative inquiry is useful when a different perspective is needed, or when we wish to begin a new process from a fresh, positive vantage point. It can help move a group that is stuck in “what is” toward “what could be.” Appreciative inquiry can be used with individuals, partners, small groups or large organizations.

<table>
<thead>
<tr>
<th>Problem Solving</th>
<th>Appreciative Inquiry</th>
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<tr>
<td>“Felt need” Identification of the problem</td>
<td>Appreciating and valuing the best of “what is”</td>
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<td>Analysis of causes</td>
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<tr>
<td>Basic Assumption: An organization is a problem to be solved</td>
<td>Basic Assumption: an organization is a mystery to be embraced</td>
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</table>
General Flow of an Appreciative Inquiry Process:

Appreciative inquiry can be done as a longer structured process going through five phases of:

**DEFINITION:** Surfacing the focus for inquiring appreciatively
**DISCOVERY:** Identifying organizational processes that work well
**DREAM:** Envisioning processes that would work well in the future
**DESIGN:** Planning and prioritizing those processes
**DELIVERY:** Implementing the proposed design

The basic idea is to build organizations around what works, rather than trying to fix what doesn’t.

At the start is a positive topic choice — how we ask even the first question contains the seeds of change we are looking to enact.

Appreciative inquiry can also be used as a way of opening a meeting or conversation by identifying what already works. What do you value most about your self/work/organization?

For more information: [http://appreciativeinquiry.case.edu/](http://appreciativeinquiry.case.edu/)
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 The World Café Resource Guide)

**Assumption of a World Café**
- 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

**What is a World Café Good For?**
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.

**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 other table members to move to other tables as ambassadors of ideas and insights
- Ask the table host to share key insights, questions and ideas briefly with new table members, 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

**Operating Principles of World Café**
- 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

**Café Etiquette**
- Focus on what matters
- Listen to understand
- Contribute your thinking
- Speak your heart and mind
- Link and connect ideas
- Listen together for themes, insights and deeper questions
- Play, Doodle, Draw - Have fun!
Open Space Technology*

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 - the people in the room. Open Space is a simple and powerful way to catalyze effective working conversations and to truly invite organizations to thrive in times of swirling change.

**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 uses its passion and responsibility, and is given the time to make something happen.

**The Law of Two Feet**

If you find yourself in a situation where you are not contributing or learning, move somewhere where you can. Follow your passion and take your responsibility.

**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 it's over it's over

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

**Roles in Open Space**

- Host - announce and host a workshop
- Participant - participate in a workshop
- Bumblebee - "shop" between workshop
- Butterfly - take time out to reflect
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 interest or concern to come into the circle, write it on a piece of paper and announce it to the group.
• These people are “conveners.” Each convener places his or her 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 rest 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.

Material 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
Collective Mind Map*

A collective mind map is a quick and simple way to create a shared overview of issues and opportunities relevant to a particular subject or challenge. The mind map always has a clear focus that can be captured in a “burning” question, such as: What are the main issues or opportunities you as a team are facing now? The mind map can be done either on a large sheet of paper or screen — electronically with a mind map program projected on a screen.

Ground Rules:

1. All ideas are valuable! We do not evaluate or discard ideas at this point.

2. Whoever presents an idea or issue decides where it goes on the mind map, and whether it is a major theme or a sub-issue.

3. It’s OK to have contradicting themes or issues.

4. Whenever possible, give concrete examples.

The facilitator explains the procedure and rules of making a collective mind map. Participants present their ideas and suggestions.

Making the Mind Map

The mind map process is lead by a facilitator. All participants have access to Post-it notes. When anyone has an idea or issue they want to suggest for the mind map, they write their name on the Post-it and hold it up. Runners will collect the Post-its and give them to the facilitator, who will then call out the names in the order received. Once a person’s name is called, he or she can present the idea or issue.

If the group is large there will be a need for radio-microphones. These will be provided by the runners when it is the participant’s turn to speak. The actual map is drawn up by two scribes. The central question is at the center of the mind map. The major themes — and different issues under each theme, are recorded on the mind map radiating out from the central question.

Voting

When all themes and issues have been recorded on the mind map, the group can decide on the priorities by voting. Everyone gets a number of votes (sticky dots) that they can place on the themes or issues they see as most important.

The voting procedure gives a clear indication on which themes or issues have the highest leverage for further action. Scribes capture what is said and draw the mind map — either on a big mind map or on a screen. In the voting process, everyone has a certain number of votes to place on the themes or issues they believe are most crucial.
The Pro Action Café 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 Café is a blend of ‘World Café and ‘Open Space’ technologies. It was first conceived by Rainer von Leoprechting and Ria Baeck in Brussels / Belgium.

What is a Pro Action Café Good For?

As a conversational process, the Pro Action Café is an 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 café, 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 Café 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 Café can be used with a network of people and/or as a methodology for specific group / organization / community to engage in creative and inspirational conversation leading to wiser and more collectively informed actions.

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 they ask the community for the help they need to move their project into action. People with a call / project stand up, speak it and write it on the agenda that corresponds to a numbered café table.
Count the amount of participants divided by 4 that gives the amount of callers with projects / sessions that can be worked - with 40 people you can have maximum 10 callers with each their own project. The principle is first come first serve. If you have less callers add chairs to café tables but no more than 5 at each table. During this process each contributing participant (those who did not step forward) get to contribute / support to 3 of the different calls /projects.

When the agenda has been created invite the callers to go to their numbered café tables. There will be 3 rounds of conversation in café style of 20 to 30 minutes - each guided by a few generic questions to help deepen and focus the conversations:

**Round 1:**
What is at the heart of your call /question/ project? - to deepen the need and purpose of the call.

**Round 2:**
What is missing? What other questions could you be asking? – when the quest has been deepened, explore what could make the project more complete and possible.

**Round 3:**

This 3rd round 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.

- Then a last round where 3 new contributors visit the tables 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 create breaks for the contributors to have a drink, relax together and get ready to support another caller in their quest/ project.

Last step is to meet in the circle and invite the callers from each table to share answers to these 2 questions:
- What am I grateful for?
- What are my next steps?

If there is time the whole group call reflect shortly 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 café tables with 4 chairs in another part (if the size of the room does not allow this, then participants will move the tables and chairs themselves as soon as the agenda is created). Dress the tables with flipchart paper, colour pens and markers as basic café 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 4. Have fun and do good work together.
Action Learning*

Action learning is a technique that can be used with small groups (maximum eight people) to tackle urgent problems arising in the workplace. It has a number of astonishing and unexpected advantages:

• Team members learn about themselves and each other
• Real problems are solved
• Effective action is taken
• Leadership potential in the team is developed
• Trust and teamwork are improved
• The technique implants a learning culture in the team

How Does it Work?

Action learning is based on Socratic dialogue. Its power lies in asking questions. One member of the group is the problem presenter or owner of the focus area, and one plays the role of the action learning coach. The other members of the group make statements only in response to a question.

The rapid and profound learning that this approach unlocks has to do with the way our assumptions are constantly challenged, and we are required to unlearn beliefs and assumptions that no longer serve us or adequately reflect the facts. The fact that everybody in the group is similarly challenged makes an action learning group a safe place in which to experience the disorientation which inevitably comes when our worldview is readjusted.

From the perspective of the collective, this kind of reflection and inquiry often lead to a radical reformulation of the problem to reveal a more systemic and holistic understanding. The following description of the action learning roles can give an impression of what happens in an action learning session.

Guidelines for Action Learning Roles

Problem Presenter/Focus Area Owner

• Take 2-3 minutes to highlight key elements of the problem/challenge/task
• Trust the group to ask for important information/details
• Be brief. Too much detail gets in the way of asking questions that challenge assumptions
• Answer questions concisely
• Don’t be afraid to say “I don’t know” or “I’m not sure”
• Feel free to ask questions of others
Members/Participants

• Seek to gain understanding of the problem by asking questions
• Make statements only in response to questions
• Ask questions of other group members
• Build on each others’ questions
• Listen to the action learning coach
• Avoid yes/no questions (closed questions)
• Listen, listen, listen

Action Learning Coach

• Focus on helping the group learn/improve — not on solving the problem. Do not criticize the group
• State rough agenda for the session up front: questions on the issue, followed by actions to take on the issue. Monitor time.
• Only ask questions — questions begin action learning session
  o “Could you take a minute or so to tell us the problem or task that you would like the group
to help you with?”
  o Ask questions at first intervention (8-10 minutes into session)
  o “How are we doing as a group so far? OK? Not OK? Great?”
  o “What are we doing well? Give an example? What was the impact?”
  o “What could we do better? Can you be specific?”
  o “Do we have agreement on the problem – yes or no?”
  o “Why don’t we all write it down? Is there agreement?”
• Add additional intervention question areas: quality of questions; building on each others’ questions;
willingness to challenge assumptions; creativity of questions; ask problem presenter which questions
have been most helpful; quality of ideas and strategies; learnings thus far about problem context,
leadership, teams
• Concluding questions:
  o (To problem presenter) “What action are you going to take as a result of this session? Were
you helped?”
  o (To entire group) “What did we do best as a group? Quality of our questions? Learning or
problem-solving? Team formation/development? Demonstrated leadership behaviors? What
did we learn that we can apply to our lives/organizations? Transformative learning? While
informative learning concerns changes in what we know, transformative learning happens at
a higher level and produces changes in how we know, generally enabling us to embrace
greater complexity.”

Author of this description: Helen Titchen Beeth
Consensus Decision Making*

Consensus can be a very powerful model of participatory decision-making when it is considered to be a “win-win” process and held as integral to the purpose of the group. Although it is sometimes abandoned as being overly complex and time consuming, consensus decision-making opens the process to careful consideration, listening and negotiation. In this context, everyone has an opportunity to express their views and/or feelings. Each person believes he or she has been heard and understood. Although individuals may feel that if they made the decision on their own they would not go in the direction the group is going, they are willing to support this decision of the group because they have had an opportunity to provide input and influence others and feel truly understood.

Consensus should not be seen as giving power to a small group to veto a decision. Opposing a suggestion or decision also means being willing to take responsibility for moving the process forward.

In working with participatory processes, it’s important to agree on the decision-making process ahead of time. Consensus usually ensures that everyone is on board and ready to act once the decision has been made.

Other agreements can be to settle for 75 percent consensus or have a democratic decision making process, or simply collect input and let a chosen group make the decision — whatever serves the purpose best.

What Happens When you don't Agree on a Decision Making Process?
Sometimes a group will move forward on its path and begin making decisions before agreeing on how such decisions will be made. This may work — or appear to work — at the outset of a process, but some difficulties can occur.
When Practicing Dialogue, Remember...

SUSPEND JUDGEMENT, ASSUMPTIONS, CERTAINTIES
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.

FOCUS ON WHAT MATTERS

ACCEPT THAT DIVERGENT OPINIONS ARE OKAY
We do not always need to reach a consensus. Innovation and new solutions come from putting different perspectives together.

SPEAK ONE AT A TIME, SPEAK WITH INTENTION

LISTEN TO EACH OTHER CAREFULLY, LISTEN WITH INTENTION

BE AWARE OF YOUR IMPACT ON THE GROUP
We each contribute to a good dialogue. We can be aware that we do not monopolize the speaking time and make sure everybody can be heard.

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

LISTEN TOGETHER FOR INSIGHTS AND DEEPER PATTERNS OR 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. Listen to the meaning underneath the meaning.

LINK AND CONNECT IDEAS
This is how we can learn, surface what we do not know yet, innovate and see the connections and patterns.

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

PLAY, DOODLE, DRAW
Use a large sheet in the middle as a space to capture the results of your collective reflection. Making it enjoyable helps learning.

HAVE FUN!
Asking the Right Question

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 and invites people into inquiring together. This is the key question or the calling question for the conversation that is compelling enough to call forth participation. For this reason, it is best to discover and formulate the calling question with key stakeholders.

The conversation may include other questions than the calling question. Questions capture the need for people coming together and therefore, they are critical to a conversation being successful.

Some Guidelines for Asking 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?

A Powerful Question Focuses Attention, Intention and Energy. It:

• Is simple and clear
• Is thought provoking
• Generates energy
• Focuses inquiry
• Challenges assumptions
• Opens new possibilities
• Evokes more questions
The Art of Harvesting*

How many good conversations and crashing insights are lost because they are never recorded, shared or acted on?

What if we were planning not a meeting but a harvest?

When we understand the process of meaningful conversations as a series of connected phases ("breaths"), we see that each must somehow feed into the next — and the oxygenation of the greater system requires the fruits of the conversation to leech out into the wider world. When approaching any meeting in this spirit, we must become clear about why we are initiating the process. The art of hosting and the art of harvesting dance together as two halves of the same thing.

Harvesting is more than just taking notes. To get a sense of the complexity of this art, let's begin by picturing a field in which someone has planted wheat. How can that field of wheat be harvested?

We first imagine the harvest from that field as a farmer using equipment to cut down the wheat, thresh it and separate the seeds from the stalks. The farmer might store the grain, further refine it, sell it quickly or wait for the price to increase.

Now imagine a geologist, a biologist and a painter harvesting from the same field. The geologist picks through the rocks and soil gathering data about the land itself. The biologist might collect insects and worms, bits of plants and organic matter. The painter sees the patterns in the landscape and chooses a palette and a perspective for a work of art.

They all harvest differently from the field. The results of their work go to different places and are put to different uses. But they all have a few things in common; they have a purpose for being in the field and a set of questions about that purpose, they have a pre-determined place to use the results of the harvest, and they have specific tools to use in doing their work.

Despite the field being the same, the tools and results are specific to the need, purpose and inquiry. There are seven stages of harvesting. The following pages briefly describe these stages.
Stage One: Sensing the Need

Sensing the need may at first be intuitive or very basic — such as sensing hunger, but once the sensed need becomes conscious one can act on it.

We sense that we are hungry, and from there we plant a garden, knowing that the work of planting, cultivating and harvesting lies before us — but that the end result meets the need for sustenance.

The need is not complicated; it is real and clear and it speaks deeply and inspires invitation and action. Everything begins from this need, and the way we respond to it and invite others to do so will contribute to the harvest that we take away at the end of the day.

Stage Two: Preparing the Food

In some cases, the person taking the initiative to work on a given issue (the “caller”) makes the field ready by creating awareness of the need. Others with a similar need will recognize the call. In preparing the field — sending out the call, giving the context, inviting — we set the tone of the whole process. The seriousness and quality of the call will determine the quality of what we reap. The work of readying a field for planting can take a whole year, during which we condition the soil, clear the rocks and prepare. What we are doing here is actually harvesting a field so that the seeds can be planted.

In other words: start thinking about the harvest from the very beginning — not as an afterthought.

Stage Three: Planning the Harvest

Planning the harvest starts with and accompanies the design process. A clear purpose and some success criteria for the process of the harvest itself will add clarity and direction. What would be useful and add value — and in which form would it serve best?

Translated into a simple check-list, it becomes:

• What is your intention?
• Who is going to benefit?
• How can you add most value to the work at hand — how will the harvest serve best?
• What form or what media will be most effective?
• Who should host or do the harvesting?
• What is the right timing?

Stage Four: Planting the Right Seeds

The questions around which we structure the hosting become the seeds for harvesting. All gardeners and farmers know that planting seeds depends on the season and the conditions. You can’t just plant whenever you want to. You plant once the conditions are right to maximize the yield.

In hosting practice, this means being sensitive to timing when asking questions. In sowing the seeds that will drive the inquiry — identifying and asking the strategic and meaningful questions — you determine the output. So in planning the harvest, ask yourself, “What is it that this process needs to yield? What information, ideas, output or outcome will benefit us here and now, and what might take us to the next level of inquiry?”
The process itself is an ongoing one. With each part of the process, you harvest something. Some of it you need to use right away, to help lead you into the next process. Some of the harvest you will need later.

So part of planning the harvest is also knowing for whom, when and how you need to use it. Another part of the planning is asking yourself in which format the harvest will serve you best.

**Stage Five: Tending the Crop**

Protect the integrity of the crop. Nurture it as it grows, weed it and thin it to keep the strong plants growing and get rid of all that will not nourish or serve. This involves a combination of feeding the field and letting it grow. But it also involves just sitting in the field — holding space for what is emerging and enjoying it.

During the process, enjoy seeing your work unfold in all its complexity. The more you can welcome the growth you are witnessing, the higher the quality of the harvest. Now you are in the pulse of noticing both the quality of the field and the quality of the crops.

*This is where we engage in conversation and exploration — where the richness of the harvest is born. The richer the conversation or exchange, the richer the harvest!*  

**Stage Six: Picking the Fruits**

The simplest way to harvest is to record what is being said and done, and the output of the conversations. This creates a record or collective memory.

Recording can be done in words:
• Your notes, which will be subjective
• Transcripts of output from conversations recorded on tapes, which will be objective

Recording can also be done with pictures, photographs, video or film.
• Pictures evoke and recall feelings, atmospheres, situations
• Video creates a verbal and visual record of the conversation

It is helpful to give some thought in the planning phase to how you want to harvest. What kind of records or templates will help you gather the relevant information or knowledge?

**Stage Seven: Preparing and Processing the Fruits**

Creating a memory is the first step. As we pick the fruits or seeds for processing, some will be used right away, some will be used for further processing and some will be used as seed for the next season.

The second step is making collective sense and meaning. This is where we add value and make the data useful. There are many ways of doing this. The general idea is to take the many bits of information and transform them into “holons” — wholes that are also parts of greater wholes.
Collective Story Harvesting*

This draws on the power of story, harvesting key threads to shine a light on what is important in an organization, community, system or movement.

Storytelling is one of the most powerful knowledge management tools of the Art of Hosting community. During the summer of 2010 we began to experiment in the Art of Hosting trainings with combining storytelling and harvesting to build our capacity in both these mediums. Collective harvesting enables us to track many arcs of a single story simultaneously, meaning we can practice targeted listening and group learning, while offering a gift to the story holders.

Collective story harvesting takes time - at least 90 minutes in the minimum time needed and more is preferable.

Preparing for Collective Story Harvesting

Identify storytellers in the group who may have a profound or transformative story to share. Make them a heartfelt invitation to share their story. When the invitation is made in this way, often a story will come out in a whole new way. A group harvest is a gift to those telling the story and should be offered as such.

Decide the story arcs you would like to harvest. Ideally this can be agreed with the storytellers and listeners, depending on where they want to focus their learning. You will need at least one person harvesting each arc you choose. More than one can harvest the same arc and it is lovely to have people who will simply listen.

Some Arcs to Choose From

- narrative arc: the thread of the story - people, events, stages
- facts arc
- emotions arc
- values arc
- process arc: what interventions, process, applications, discoveries happened
- pivotal points arc: when did breakthroughs occur, what did we learn?
- application arc: what can we learn from this story for application in our own or other systems
- taking change to scale: what can we learn about taking change to scale
- synchronicity and magic: what happened during this story that pointed to synchronicity and magic in the middle?
- collaborative leadership: where did collaborative leadership impact the story and how
- principles: what principles seemed to be at work
- paradox: where paradoxes at work - commonality and difference, opposites

Roles:

- storytellers
- hosts
- harvesters
- listeners
The Practice: Collective Story Harvesting

Preparation before hand:
- Identify story tellers - enough so that each story teller can have at least 8-10 people in their circle
- Identify a host for each story teller to host the process in the storytelling groups
- Prepare hand outs for each host with their instructions and for each harvesting arc with a few words about the arc
- Set up the story telling spaces with numbers of chairs and materials for harvesters

Framing and Introduction (15-20 minutes)
Welcome people to the session. Make the invitation publicly to the storytellers. Ask the story tellers to headline the story they will be telling for the larger group.

Explain the arcs and let people know some will be asked to volunteer. (The story hosts will do the volunteer ask in their small group.)

Storytelling (30 minutes)
Ask the storytellers to tell the story and the group to harvest. Be clear about the time allocated for the storytelling.

Small Group Harvesting (30 minutes)
Give the storytellers materials to do their harvest. Ask each harvester to report in on what they heard. Take at least as long for this as the storytelling. Each of the harvests will have more depth than can be told during a first round. It might be helpful to have more than one round of harvest or for the group to question each harvester to draw out additional insights.

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

Collective Harvest (45-60 minutes)
Come back to the full group. Ask storytellers, story hosts, like arc harvesters and listeners to sit together in small groups. Groups then debrief their experience and what they have harvested in the context of the full group inquiry. Use a question or two to guide this conversation. Invite a harvest into the room.

Strengths of Collective Story Harvesting
- It can deal with complex realities and bring simplicity as well as surface understanding and learning from complexity
- It is a harvesting of current reality - how we got to where we are now
- It creates a rich learning field
- It creates a strong connection and shared understanding between those involved in the process
- It is a gift to the storytellers and others with lots of resonant learning happening
- It is a simple, but powerful tool that can be used regularly to take stock, capture learning and refocus the field
8 Little Helpers*

Eight “helpers” are the source of good conversational design. At the bare minimum, if you use these tools, conversations will grow deeper, and work will occur at a more meaningful level. These eight 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 ground work for a good meeting. There are many ways of bringing a group to presence, including:
- Start with a poem, reading 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. Work Together With Mates
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.

3. Have a Good “Wicked 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 groups stay away from unhelpful behaviors such as 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

4. Invite Intentional Listening and Speaking
In its 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 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.

5. Harvest Something Useful
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 that you can think about as you plan meetings. Blend as necessary.

Never meet unless you plan to harvest your learnings. The basic rule of thumb 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.

6. Make a Wise, Collective 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 center 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.

7. Act and Follow Up
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 overextend or under extend the resources of a group. Action arises from the personal choice to take responsibility for what you love. Commit to the work and do it

8. Plan the Next Harvest
Most harvesting is done to bring closure to a process or bring us to the next level of understanding. More importantly, it helps us to know collectively, to see the same picture and share the same understanding together.

A Few Comments
The above reflections mainly concern collective harvesting.

Individual reflection and harvest will raise the level of the collective harvest. During learning processes, individual harvesting can be done intentionally, by using a journal as a learning tool.

Web-based tools open up a whole world of possibilities that are not dealt with here. Harvesting the “soft” is much more subtle and subjective than dealing with the “cognitive” or more objective, tangible parts. A qualitative inquiry into what we have noticed, what has shifted or changed in our relationships, in the culture or atmosphere may give us some information about the softer part of the harvest.

For the most effective harvest, these eight steps should be planned beforehand, as part of designing the whole process.
Reflective Practices

Reflection is an invitation to think deeply about our actions so that we may act with more insight and effectiveness in the future. It is probably something you do already: processing, analyzing and integrating your experiences through writing, discussions with friends or art, for example. As related to service, reflection is the use of creative and critical thinking skills to help prepare for, succeed in, and learn from service experience, and to examine the larger picture and context in which service occurs (Jim and Pam Toole, Compass Institute).

Tips for Success

Designing a Reflection Activity

An effective reflection activity should:

- Have an outcome in mind (Ex. leadership, team building, improved critical thinking, acknowledgment)
- Be appropriate for the team (age, culture)
- Happen before, during, and as soon after the service experience as possible
- Be directly linked to the project or experience
- Dispel stereotypes, address negative experiences, increase appreciation for community needs, increase commitment to service
- Be varied for different learning styles, ages
- Actively involve the service recipients for a really compelling reflection session
- Be hosted well for maximum participation, creativity and learning
There are plenty of resources and resources available about facilitating group activities. Some specifics
for service reflection activities include:

Seek a balance between being flexible to address members’ needs, and keep the process consistent
with the theme. In other words, if some notable incident happens during the day, or has been forming for
some time, it will probably be on the members’ minds enough to prevent their presence in any other
conversation.

Thus, even if you have an outcome in mind, what needs to get said may be the most important thing to
discuss or reflect upon. Similarly, the conversation should only veer with focus: Reflection questions
often lead to other questions, which lead to other questions . . . while these diversions can lead to great
discussion, they can, as easily, go all over the place with little value for participants. Maintain focus by
bringing it back to the theme or significant topic, and presenting “so what, now what” questions before
leaving a topic.

- Use silence: People need some silence to reflect internally, some more than others do. Ask the
  question then wait.
- Ensure that all participants have an equal opportunity to become involved
- Remember that in a group setting, each member of the group will learn and reflect in a different way.
  Allow space for diversity; it, too, is part of the reflection process for the group.

What? So What? Now What?*

This is a well-used and successful model to assist you in designing the reflection activities. Although you
can derive learning from each question, focusing on all three will provide broader insights and keep
participants from getting stuck on only the facts or just the feelings.

Without judgment or interpretation, participants describe in detail the facts and event(s) of the service
experience.

Questions include:
What happened? What did you observe? What issue is being addressed or population is being served?
What were the results of the project? What events or “critical incidents” occurred? What was of particular
notice? How did you feel about that? Let’s hear from someone who had a different reaction?

So What? What did you learn? What difference did the event make?
Participants discuss their feelings, ideas and analysis of the service experience.

Questions can also be focused on the meaning or importance of the activity to:
- The Participant: Did you learn a new skill or clarify an interest? Did you hear, smell, feel anything that
  surprised you? What feelings or thoughts seem most strong today? How is your experience different
  from what you expected? What struck you about that? How was that significant? What impacts the way
  you view the situation/experience? (What lens are you viewing from?) What do the critical incidents
  mean to you? How did you respond to them? What did you like/dislike about the experience?

- The Recipient: Did the “service” empower the recipient to become more self-sufficient? What did you
  learn about the people/community that we served? What might impact the recipient’s views or
  experience of the project?
• The Community: What are some of the pressing needs/issues in the community? How does this project address those needs? How, specifically, has the community benefited? What is the least impact you can imagine for the project? With unlimited creativity, what is the most impact on the community that you can imagine?

• The Group (group projects): In what ways did the group work well together? What does that suggest to you about the group? How might the group have accomplished its task more effectively? In what ways did others help you today (and vice versa)? How were decisions made? Were everybody’s ideas listened to?

Now What? How will they think or act in the future as a result of this experience? Participants consider broader implications of the service experience and apply learning. Be aware to strike a balance between realistic, reachable goals and openness to spontaneity and change.

Questions include:
What seem to be the root causes of the issue/problem addressed? What kinds of activities are currently taking place in the community related to this project? What contributes to the success of projects like this? What hinders success? What learning occurred for you in this experience? How can you apply this learning? What would you like to learn more about, related to this project or issue? What follow-up is needed to address any challenges or difficulties? What information can you share with your peers or community volunteers? If you were in charge of the project, what would you do to improve it? If you could do the project again, what would you do differently? What would “complete” the service?
Journaling: A Primer*

Journaling is one of the best reflection tools. Ideally, the program or project would allow for a 10-15 minute period every day for the volunteers to journal; preferably at the end of the day or during/after a debrief. It is helpful if staff or the project leader provides substantial structure to insure quality, conscientious journaling. Regardless of the time allotted, it is important to encourage participants to write whatever comes to mind, and to not worry about grammar, spelling or punctuation. This entails a commitment to confidentiality that nobody will ever share what they have written unless they want to. You also want to be definite and clear about the time allotted (5-15 minutes, and let them know when it is almost finished).

Journaling Methods

Clusters: Have people shout out words or phrases that describe the day. Ask each person to take two minutes to write five or six words in random spaces on their journaling page. Give a short speech about the interconnectedness of everything, the web of life, Quantum Physics, or whatever and ask them to do a free-write exercise focusing on those five or six items and how they are related.

The critical incident: Choose an incident that involved the entire team and give them a couple of minutes to think about the incident. Then ask them to write a detailed, factual report of what happened, making sure to answer the four “W” questions, “who, what, where, when.” You can then have participants share their stories to see how they differ from another.

Dialogue: A good one for developing observation and communication skills. Ask participants in the morning to pay special attention to conversations they hear throughout the day, including light conversations between staff and volunteers, volunteers and sponsors or stakeholders. Ask them to pay special attention to mannerisms, accents and the tone of the conversation. Later, have the participants pick a dialogue and duplicate how it went as closely as possible. This should be done in a lighthearted manner on a light-hearted day to avoid a “bashing” session. This is an exercise that gets better with time, as their observation and retention skills improve.

Different perspectives: A great one for developing empathy skills. Ask participants to recall a specific occurrence from the day that involved some degree of conflict. Ask them to assume the viewpoint opposite that which they actually held during this conflict (or the viewpoint they were the least empathetic with), and write a description of the conflict from this perspective. This can include what happened, their role in it, what they want, what they envision as the ideal solution. Good debrief questions are, “How did it feel to do this writing, how were you able to get into their shoes, or how was it difficult, what is one thing you realized through this writing?”

The fly on the wall: Ask participants to take a couple of moments to reflect on the day (where they’ve been, what they’ve done, whom they’ve worked with, tools they’ve used). Then ask them to pretend they were a “fly on the wall,” observing but not participating in the scene, and write a short descriptive passage based on their observations. You can also use any animal or plant or person that was near the project site.

Guided imagery: Encourage participants to relax, close their eyes, get comfortable, notice their breathing, and read a guided imagery. Then, ask the participants to free write about what they experienced.

The free write: This is the easiest and perhaps most effective journaling method, wherein people who think they “can’t write” or “have nothing to say” realize how much and how well they can write. For a predetermined amount of time, participants engage in continuous writing by keeping their pens moving . . . even if only to write, “I don’t know what to write.” It is helpful to trigger the free write with an open-ended sentence such as “I don’t think I’ll ever forget . . .” or “If I could do one thing differently, I would . . .” or make up your own! Let participants know when they are nearing the end of the writing time, and then ask them how it went.

The letter: Have participants write a letter to themselves, a relative, a historical figure or a political figure describing the project and what it means to them, or ask for some piece of advice.
Listening Practices***

Top Ten Powerful Listening Practices*

1. Stop Talking
   One person speaks at a time. One of the most irritating listening habits is that of interrupting.

2. Pause Before Speaking
   Allow the person who is speaking time to complete their thought, wait a few seconds before responding. Another variation on this is to ask “Is there anything else?” There almost always is.

3. Listen to Yourself
   Be in touch with your inner voice. Ask yourself, “What wants to be said next?”

4. Listen for Understanding
   You do not have to agree with what you hear, or even believe it, to listen to understand the other person.

5. Ask for Clarification
   If you do not understand what someone is saying, just ask.

6. Let the Speaker Know that you have Heard Them
   Be aware of body language: nodding, facial expressions.

7. Be Patient and Present
   Listening well takes time and your presence.

8. Listen With an Open Mind
   Be curious and appreciative of what you are listening to. Listen for new ideas instead of judging and evaluating.

9. Pay Attention to the Environment
   Stop what you are doing to listen. Turn off background noise when possible; move to a quieter corner of the room; clear your desk.

10. Listen with Empathy and Compassion
    Put your agenda aside for the moment. Put yourself in their shoes.
Reflective Listening*

Reflective listening/mirroring is the restatement of what you have heard a speaker say for purposes of clarification. A second stage can be used to state a feeling the listener has heard embedded in the message. We are checking out our interpretations by asking if the reflection is a correct interpretation. We are reflecting, but always with a question mark. No one likes to be told how they are feeling if it does not match what they are feeling.

Reflective Listening is used:

1. When we sense we do not fully understand and we would like to learn more about how he/she experiences their situation
2. When we sense there is more to what the other person is saying than what is being expressed
3. To summarize from time to time in order to pull together important ideas and establish a basis for further discussion
4. To verify a feeling the listener has heard embedded in the message
5. To validate a quality or value the listener might have heard embedded in the message

Benefits of Reflective Listening

1. The communication level may be deepened
2. The listener may become more empathetic/compassionate towards the speaker
3. The speaker may be able to gain greater self-understanding, clarity and vulnerability through effective mirroring
4. A shift in perspective may occur through mirroring statements

First level: facts
The listener repeats what the person has said and checks for confirmation that the important parts of the communication were heard accurately.

Second level: feelings
The listener expresses the essence or meaning behind the words, including the feeling and tone and asks for accuracy.

Third level: values / essence
The listener deepens the mirroring to the being or core level of the speaker’s communication and reflects the values or essence of what was heard.

If you listen well enough, you can listen another person into being.

Changing the quality of the listening, changes the quality of the conversation.
Feelings Inventory

:) Likely to be experienced when our needs ARE being fulfilled

absorbed friendly satisfied
adventurous fulfilled secure
affectionate glad sensitive
alert gleeful splendid
alive glorious stimulated
amazed good-humored surprised
appreciative grateful tender
aroused gratified thankful
astonished groovy thrilled
blissful happy touched
carefree hopeful tranquil
cheerful hopeful warm
comfortable invigorated wideawake
carefree involved wonderful
cheerful involved zany
comfortable inspired zestful
carefree interested
contented intense
cool intriqued
curious joyous
dazzled jubilant
delighted keyed up
eager loving
ecstatic mellow
elated merry
electrified mirthful
encouraged moved
energetic optimistic
engrossed overjoyed
enlivened overwhelmed
excited peaceful
exhilarated proud
expansive quiet
expectant radiant
exultant rapturous
fascinated refreshed
free relieved
:) Likely to be experienced when our needs ARE NOT being fulfilled

afraid
aggravated
agitated
alarmed
aloof
angry
anguished
animosity
annoyed
anxious
apathetic
apprehensive
averse
beat
bitter
blah
blue
bored
broken-hearted
chagrined
cold
concerned
confused
cool
cross
dejected
depressed
despairing
despondent
detached
disappointed
discouraged
disgruntled
disgusted
disheartened
dislike
dismayed
displeased
distressed
disquieted
disturbed
downcast
downhearted
dread
dull
deady
embarrassed
embittered
exasperated
exhausted
fatigued
fearful
fidgety
forlorn
frightened
frustrated
furious
gloomy
grief
guilty
hate
heavy
helpless
hesitant
horrible
horrified
hostile
hot
humdrum
hurt
impatient
indifferent
inert
intense
irate
irked
irritated
jealous
jittery
keyed up
lassitude
lazy
lethargic
listless
lonely
mad
mean
melancholy
miserable
mopey
nervous
nettled
overwhelmed
passive
perplexed
pessimistic
puzzled
rancorous
reluctant
repelled
resentful
restless
sad
scared
sensitive
shaky
shocked
skeptical
sleepy
sorrowful
sorry
sour
spirittle
startled
surprised
suspicious
tepid
terrified
tired
troubled
uncomfortable
unconcerned
uneasy
unglued
unhappy
unnerved
unsteady
upset
uptight
vexed
weary
withdrawn
woeful
worried
wretched
**Values Inventory**

In listening deeply to one another, our hearts assist us to hear the values underneath the words, rhetoric, or strongly held positions. When we listen deeply and can reflect the values that we hear, we connect to the wholeness in the other.

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<th>Values</th>
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<td>BEAUTY</td>
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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 cooperation.

Principles — when defined with clarity, conviction and common understanding — guide our pursuit of purpose. 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.

A Core Hosting Team Holds a Field

This is really a co-creative effort. Some of the functions can merge (Ex. stage managing and logistics), depending on the size and complexity of the process. The strategic perspective is held by the caller and members of his/her team on the content level and by the hosts who hold the process level.

Who Should be on the Hosting Team?

- An ideal hosting team consists of:
- The caller who has sensed the need to convene this process
- Members of his/her 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 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 not even be visible to the participants. They act then as coaches of the team.

Detailed Roles in a Hosting Team

Caller
The caller is the client of the process. He or she has sensed the need for it and has invited the hosting team to help him/her give birth to a process out of which the expected outcomes could be produced by a group. The caller is part of the process to:

- Co-draft and send the invitation
- Welcome people
- Frame the purpose
- Listen to what is coming out of the conversations
- Help the hosting team to adapt the process if necessary
- Commit to follow-up on the outcomes

Strategic Perspective Team
The caller and other people with the strongest stakes in the outcomes of the event have the following responsibilities:

- 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 learnings of this group
- Liaising with the hosts to keep the event on tracks
- Welcome

Hosting Team
- Facilitate the processes
- Be a visible part of the team

Speakers
The speakers include the caller and perspective-givers, and those who make concluding remarks.

Harvesting Team
Support the strategic group and speakers at any time
- Collect the results of the conversations on the appropriate supports at different levels (meta level, full details)
- Collect all pieces of harvesting throughout the event
- Have responsibility for recording tools: mind maps, harvesting sheets, pictures, landscape
- Produce outputs: landscape, newsletter/live minutes, full record, strategic paper
Welcome Team
The welcome team is responsible for speakers, guests and participants and has the following responsibilities:
• Have them all sign the presence list
• Hand out badges and welcome pack

Logistical Team
• 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 equipments: microphones, PC, beamer

Stage Manager
• Prepare in advance and distribute all handouts and harvesting sheets to participants
• Manage slide shows whenever used

Follow-Up/Strategic Continuity
• Identify the wisest next steps in service of the development of individuals, the organization and the common good
Checklist for the Design of Learning Processes or Meetings*

Before the Process Meeting

Preparation (Purpose: to create focus for, and prepare for the meeting/process)
- Get the participants’ “meaningfulnesses” on the table
- Assess needs
- Identify burning questions
- Clarify purpose, goals and methods
- Send out an invitation with a clear purpose
- Prepare logistics and material
- Prepare 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
   - Define context: “The greater context … the many aspects, conditions and relations that surround a certain situation or case, and that contribute to define or determine which meaning to give to the situation.”
   - Define purpose, short- and long-term
   - Framing: Set boundaries and “givens”
   - Check in — physically, mentally, emotionally — so everyone’s voice is heard and everyone is present.
   - Share 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 results, decisions
   - State conclusions
   - Determine agreements
   - Check out (personal)

After Meeting Process

- Follow-up (purpose: review, learning, anchoring)
- Review of experiences and results
- Evaluation
- Learning
- Anchoring of the meeting/process
- Full stop … or beginning
First Breath - The Call / Need

• Name the issue: Call the core question — birth of the callers. We have noticed that there is always a caller — a person who deeply holds a question, a problem, a challenge. Sometimes there are several callers. The callers are the ones who invite the host(s) to help them.
• Wise action: Focus the chaos of holding the collective uncertainty and fear — step into the center of the disturbance
• Don’t move too fast
• Question: What is really at stake here? What if some of us worked together to surface the real question and need that matters to the community?

When the caller has committed to call the process, we go to the next phase.
Second Breath - Clarify Purpose

• Create the ground: The callers and hosts work to create collective clarity of purpose and the first articulation of principles
• Wise action: Engage
• Don’t make assumptions
• Question: How to get from need to purpose? What is our purpose? How to see and feed the group value?

This phase is over once the core of clarity has emerged.

Third Breath - Invite Participation

• Giving form and structure: Design an invitation process
• Wise action: Keep checking to be sure your design and invitation serve the purpose
• Don’t make your design too complex (match it to the purpose)
• Question: How do we invite people to participate in a way that moves them to show up? How do we let go of our expectations that certain people need to be there?
• The meeting has been designed, a larger group of stakeholders has been invited, a good meeting space has been found. It’s time to meet!

Fourth Breath - MEET!

• Meeting: Hold conversation
• Wise action: Our role is to host the group, the purpose and the questions
• Don’t go alone
• Question: How can I best serve as the instrument/container to allow the collective wisdom to emerge?

AND MAKE MEANING TOGETHER

When the meeting is done, the group of stakeholders find collective meaning and start to co-create. This is where the harvest is important — to capture key messages and insights and make sense of them

Fifth Breath - ACT

Here the seed of community gets born, and the results are a connectedness between the stakeholders and wiser actions.
• Practice: Perform the wise actions decided on during the conversation. Follow up — continued learning and leading from the field
• Wise Action: Always come back to purpose
• Don’t lose sight of the purpose or it won’t be embodied
• Question: How do we sustain the self-organization?

From here the next calling question arises.
This is a beautiful process to use to reflect on a meeting, project or initiative you want to call. It emphasizes the thoughtfulness and intention required to establish the conditions for conversations that matter and are different than the usual conversations that show up. Usually a caller brings forth an idea and three to six people join the caller in exploring the process and questions below. It is lovely to have at least 45 minutes for this conversation and up to an hour and a half.

**PURPOSE**
What is the big purpose you are trying to fulfill? How does that purpose meet your understanding the need it is intended to address?
*(A Statement of Purpose defines, with absolute clarity and deep conviction, the purpose of the conversation/meeting/work/ community/other. An effective statement of purpose will be a clear, commonly understood statement of that which identifies and binds the work / community together as worthy of pursuit.)*

**HARVEST**
What do you want to harvest, remembering that the harvest is how we make and share meaning of the experience? What is the purpose of the harvest and who are the audiences? Different audiences may be served better by a different harvest.
- In your hands (tangible)
- In your hearts (intangible)

**INVITATION**
Who is it we are wanting to bring together?
What is the inspiring question that will bring people together?
How will we invite people so they know they are really needed?
*(remember: How I am invited will determine how I show up…… If it about us don’t do it without us”)*

**MEETING**
What will you do to make the meeting/initiative/process more creative and powerful?
What does your design flow 1.0 look like?
What methodologies would best serve your purpose?
How will you surface and play with limiting beliefs?

**WISE ACTION**
How will you invite action?
How will action happen?
How will you design the conclusion (convergence) of the meeting, project or initiative to help foster wiser and more committed action?
*(Please do not get stuck in the details or differences of opinion…. If you need help remember that: “It is kind to ask for help – a person who cannot ask for help cannot be trusted.”)*
The chaordic path is the path that walks between chaos and order. When we don’t know where we are going, or what the future means for us, we can bring a little bit of form to our work by working with clear steps. These steps are intended to create generative structures, structures that allow us to create together, without stifling creativity and the emergence of new ideas and new ways of doing things.

There are clear strategic steps we take when walking the chaordic path. These steps allow us to create steps rooted in real need that are sustainable for the community they serve and the people working within them. These steps can be used both as a planning tool and to help understand what you are discovering about an organization, community or initiative.

In designing an initiative like this, we use these stepping stones in order. Think of them nested one within the other. You cannot build the next one until the previous one is in place.

**The Stepping Stones**
Each of these stepping stones is activated by asking key questions. As we design our work together, we will select from these questions (or design others) to help us explore each stone as we lay it in place.

**NEED**
The need is the compelling reason for doing anything. Sensing the need is the first step to designing a meeting, organizational structure or change initiative that is relevant. The need is outside of our work. It is what is served by the work you are doing.

- 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?
- What do I really need to be able to understand and work on in the world?
- What is the need that this project can uniquely meet?
- What does the world need this conference to be?

**PURPOSE**
From the need flows the purpose. Purpose statements are clear and compelling, and they guide us in doing our best possible work.

- If this work should live up to its fullest potential, what do you dream (or vision) is possible?
- What is the purpose we can adopt that will best meet the need?
- What could this work do/create/inspire?
- What is the next level for our work? Where should we be heading?
- What is the simplest and most powerful question we could keep at the core of our work?
**PRINCIPLES**

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.

- What are the principles we want to enact for our learning networks?
- What is important to remember about how we want to work with the participants in our initiative?
- What do we think is most important to remember as we design to meet the need and purpose?
- What unique ways of doing work and being together can we bring to this work?
- If our team should live up to its fullest potential — what do you dream (or vision) possible for this team?

**PEOPLE**

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 who are involved in our work. Mapping the network helps us to see who is in this work and who will have an interest in what we are doing.

- Who is in the room?
- Who is not in the room and how do we bring them in?
- How do we leverage relationships to propagate the ideas generated by our work together?
- Who will be interested in the results of our work?

**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 endeavor. 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. In our work together, we might explore the different kinds of structures, including circles and networks, and really understand what these are, how they operate, how they are embedded with various contexts and cultures, and what implications each has for our work.

- What are the shapes that we might choose for our work?
- What is the deeper pattern of our work, and what organizational forms are in alignment with that?
- How might we activate our principles to best do our work?

**LIMITING BELIEFS**

So much of what we do when we organize ourselves is based on unquestioned models of behavior. 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 and approaches. 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.

- 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 do you need from our core team to feel supported in the places that make you anxious?
STRUCTURE
Once the concept has been chosen, it is time to create the structure that will channel our resources. It is in these conversations that we make decisions about the resources of the group: time, money, energy, commitment and attention.

• Who are we becoming when we meet and work together this way?
• How do we support the aspirations of the group?
• What is the lightest structure that will serve our purpose and need?
• What role might the core team play when the project is over?
• How do we wisely combine the various organizational concepts to support our work and sustain the results?

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

• What do we need to do to sustain our work together?
• What is our own practice of working in networks?
• How do we extend the spirit of the gathering into future asynchronous environments where we can’t be face to face?
  • How do we leverage relationships and support the work that arises from them?
  • How do we sustain and nourish our relationships and collective aspirations?
  • What commitments are we willing to make to contribute to the success of our endeavor?

HARVEST
There is no point in doing work in the world unless we plan to harvest the fruits of our labors. Harvesting includes making meaning of our work, telling the story and feeding forward our results so that they have the desired impacts in the world.

• What are the forms of harvest from our work that best serve the need?
• What intentional harvest will serve our purpose?
• What are the artifacts that will be the most powerful representations of what we have created?
• How will we carry the DNA of our work forward?
• What are the feedback loops that we need to design to ensure that learning and change accelerates itself?
  • How will we stay open to emergent learning?
  • What are the questions we need to carry about what we are learning by meeting this way?

It is very important to note that harvesting is an activity that needs to be planned up front, in the spirit of “we are not planning a meeting, we are planning a harvest.”
Developing sustainable outcomes in a project or initiative requires attention to three domains in the formation of an effective team or work group and the project itself. Attention to these domains – work, co-learning and relationships – moves the process from just a group to a deeper community. The conditions are set for a group to become more cohesive and to discover new learning and emergent solutions to the issues on which they are working. Equal weight needs to be given to each domain in the process.

Work
Of course the reason for coming together is to do work. Getting the work done is key to sustainable outcomes. An important first step is to gain clarity on what the work is. There are many tools that can help groups come to clarity about the work they need to do. Tools for gaining clarity on work include design tools like the diamond of participation, the chaordic stepping stones and other project planning tools that invite clarity about questions and harvest insights back into the team’s work.

Relationship
For groups to be more than just collections of individuals, they need to focus on their relationships. Relationships are the glue that keeps work sustainable. Paying attention to how we are together creates the conditions for our work to excel over the long term. Teams or communities that have to focus on toxic, competitive or unhelpful relationships spend too much energy caught in conflict and difference and can’t get real work done. At the outset of working with a team or community of practice, it’s important to identify relationships as a key capacity leading to innovation, excellence or success. And when things go sideways, having solid relationships in place ensures that the group can find a way out quickly and effectively.

Co-Learning
If an individual or a group wants to become innovative or to think or practice its way to another level of work, learning is essential. At a personal level, cultivating curiosity is critical, so that individuals enter work, practice and conversations with questions that guide their participation in an endeavour. Beyond individual learning, collective learning or co-learning is the fastest way to breakthroughs. Engaging in collaborative inquiry is important to keep a group on the edge of its own learning. Groups need to practice fearlessness to try to embrace new ideas and new ways of doing things.

Alive in the Intersections
The intersection of work and relationships results in one feeding the other and leads to sustainability in the kinds of endeavours one is undertaking, especially when the going gets tough. At the intersection of work and co-learning is innovative thinking that helps to drive work to new levels. At the intersection of co-learning and relationships is where a group comes to see itself as more than just a team, and learns new ways of being together and new forms of connection that serve the greater purpose. And of course at the centre of it all is the possibility of community, arising out of a balanced approach to all three domains.

Shared by Jerry Nagel
Despite current ads and slogans, the world doesn’t change when networks of relationships form among people who share a common cause and vision of what’s possible. This good news for those of us intent on creating a positive future. Rather than worry about critical mass, our work is to foster critical connections. We don’t need to convince large numbers of people to change; instead, we need to connect with kindred spirits. Through these relationships, we will develop the new knowledge, practices, courage and commitment that lead to broad-based change.

**Systems Have Life Cycles**
They have a beginning, middle and end. We can see many of our modern systems seem to be failing to sustain themselves in the complexity of our times.

**In Living Systems, Change Happens Through Emergence**
In nature, change never happens as a result of top-down, pre-conceived strategic plans, or from the mandate of any single individual or boss. Change begins as local actions spring up simultaneously in many different areas. If these changes remain disconnected, nothing happens beyond each locale. However, when they become connected, local actions can emerge as a powerful system with influence at a more global or comprehensive level. (Global here means a larger scale, not necessarily the entire planet.)

**Working Intentionally with Emergence**
When separate, local efforts connect with each other as networks, then strengthen as communities of practice, suddenly and surprisingly a new system emerges at a greater level of scale. This system of influence possesses qualities and capacities that were unknown in the individuals.

**Lifecycle of Emergence**
- Networks - commitment to self, fluid membership, fluid roles
- Communities of Practice - commitment to advance field of practice, focus on creation and dissemination of knowledge, distinct roles
- Systems of Influence - pioneering efforts suddenly become the norm

**Creating the Conditions**
- Start anywhere, follow it everywhere
- The leaders we need are already here
- We have what we need
- We are living the worlds we want today
- We make our path by walking it

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*2 Loops of Systems Change*
“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 explores a whole new territory of scientific research and personal leadership. By moving through the "U" we learn to connect to our originating Self. We travel down the left side of the "U" to find ourselves in the realm of presencing, where we learn to sense the future that is seeking to emerge. At that level of operating, we experience the opening of our minds, our hearts and our wills. Yes, this is an intellectual journey, but it’s one that is grounded in real life experience and shared practices. On this journey of sensing, presencing and realizing, we learn new ways of being—ways crucial for each of us at this chaotic time.

Fundamental problems, as Einstein once noted, cannot be solved at the same level of thought that created them. Learning to pay attention to our attention and to illuminate the blind spot can be the key leverage point to bring forth the profound systemic changes in business, society and in science so needed now.
In November 2006, the Council of the College of Registered Nurses of Nova Scotia (CRNNS) embarked on a 1500 day collaborative journey, the likes of which they could hardly imagine was possible at the time. What was clear was that the College had a vision and a mandate to grow inter-professional collaborative practice (IPCP) from pockets here and there across the province to a more widespread practice as one of the responses to a health care system in need of shifting the way services were delivered.

They knew this was not a mandate that could be achieved alone and they weren’t quite sure how to invite other professions into the conversation. They contacted an Art of Hosting colleague of mine who invited me into the process and we worked with a team from the College to begin to clarify the work.

Early on we identified that this would likely be a long term process that would use Theory U to define the journey and Art of Hosting as the operating system. Before the journey could even begin, others needed to be invited into the conversation so that other people and organizations could identify what contribution and what level of support or commitment they were willing and able to offer.

The College hosted its first assembly in November 2006 to announce its mandate, speak what they were hearing in the system and being called to do, invite a broad array of health care professionals into conversations using processes like Appreciative Inquiry, World Café and circle which many participants experienced for the first time ever that day.

Out of this assembly a core team of about twenty-five people and financial support from a broad range of health organizations self identified to commit to a multi-year process that included two Art of Hosting retreats (one a sensing retreat and one a presencing retreat) to train the core team, deepen their understanding of the purpose and principles of the work and identify a strategy to move this mandate forward. We called on Art of Hosting colleagues doing similar work in Ohio and in England to come and also support this initiative, bringing with them a wealth of experience and weaving in the stories from other places that increased the anticipation of successfully shifting the shape of collaborative health care in Nova Scotia.

The collaborators included: Annapolis Valley Health, Capital Health, College of Licensed Practical Nurses of Nova Scotia, College of Physicians and Surgeons of Nova Scotia, Dalhousie University, IWK Health Centre, Nova Scotia Association of Health Organizations (now Health Association of Nova Scotia), Nova Scotia Department of Health, Pharmacy Association of Nova Scotia, Registered Nurses Professional Development Centre and the Pictou County Health Authority. The team included people from many of these organizations and was itself inter-disciplinary.

In between the two retreats, the core team embarked on a series of sensing strategies to broaden their own understanding of the health care system in Nova Scotia, identifying challenges and opportunities without assuming they already knew all the answers. One purpose in this was to also engage a more stakeholders and learn from them what would capture their support, interest and imagination. Seven group interviews and thirty five individual interviews were conducted, designed to elicit their private voice more than their public voice. It is in the private voice that deep despair and incredible hope both reside.
The information that came back from these interviews was powerful. So powerful it was used to invite back a large assembly of stakeholders in May of 2008 to hear the results and, most importantly, to hear the voices of the system spoken back into the room. In response, somebody said, “What we are seeing is a crisis of the soul.”

We asked people: “What would you do that you’ve never done or dreamed of doing to change the future of healthcare?” They responded:

- Change the way we deliver health care
- Change the focus of health care
- Change education of practitioners
- Change what we say to communities
- Change governance of health care
- Change relationships and how we work together

We asked, “What should the purpose of the health care system be?” To which they responded:

To create and maintain holistic, accessible support and care so that Nova Scotians may live well in a place they call home.

To facilitate and empower the individual and the community to create and maintain optimum health as defined by the individual.

The purpose of the healthcare system is evidence based, person-focused, preventative, holistic, and uses a collaborative approach to optimize the health, safety, wellbeing and environment of people within their communities.

People made commitments that day and the College made a commitment to check back in later with their last assembly to acknowledge and celebrate progress. That day happened in June 2010.

Six champion collaborative practice teams currently providing services in Nova Scotia were invited to present at the Assembly, modeling the way and illuminating the steps to successful collaborative care in Nova Scotia.

Have all the ideas identified in May of 2008 been implemented? No. But in 2010, there was far more collaborative care in Nova Scotia than there was in 2006 when the College began its quest and invited in collaborators, retaining its willingness to be a champion of this work and, at the same time, “letting it go” so that it could be co-created throughout the whole journey with those who stepped forward to share the leadership and responsibility of this work in Nova Scotia. Other initiatives focusing on Collaborative Care also emerged during this time helping to expand awareness and the field of practice and this does not lessen the impact of the Inter-Disciplinary Collaborative Practice initiative in generating impactful responses to a system in need of change.

Some things have fundamentally changed. Some things are still to come.
Prototyping Collaborative Leadership in Capital Health*

By Kathy Jourdain

In March 2007 Capital District Health Authority (CDHA) in Halifax, Nova Scotia took on a planning process called Strategic Quest. A significant component of Strategic Quest included public participation in an unprecedented way. The results were revealing and the impact continues to reverberate throughout the organization today, strongly influencing ongoing public participation in a number of areas and inviting collaborative leadership as a strategy to accomplish many of its goals.

Two specific initiatives that I was involved with where Collaborative Leadership was an essential part of the process are:

• Infusion: a gathering in November 2008 of 70 leaders from across North America, in our local community and within Capital Health, convened to inform what bold and unique leadership development within Capital Health could look like

• Citizen Engagement and Accountability Portfolio: a new portfolio created in direct response to one of Capital Health’s strategic streams and launched in May 2009.

Infusion

The planning process for Infusion, championed by Lea Bryden and led by Shape Shift Strategies, invited and modeled collaboration, shared leadership and shared responsibility. A diverse group of people from across Capital Health were invited into the planning process. Many identified the planning process itself as a leadership development opportunity as they experienced collaborative leadership in new ways, stretching beyond their original assumptions about how and what they could each contribute to this unusual event.

Achieving clarity of purpose was the first task. It required a significant investment of time – several meetings. It was a difficult task because there were multiple overlapping components all alive and unfolding as we were in this planning process. We stayed in the conversation until sharp clarity was achieved and then rest of the planning process unfolded rapidly because it was guided by this clarity of purpose.

The planning process always had a forward momentum, even when people missed meetings. As they came back in, they found their place in the process and continued to contribute constructively. They could step into and out of the flow of the process without having to back track and rehash decisions made when they were not present.

The two day event drew on the talents of everyone on the planning team. Invited guests: leaders from a vast array of backgrounds, many of whom were leadership consultants, were asked to bring their knowledge and expertise in a participatory way. It was at times a challenging field to hold. The team was able to hold its ground as we went through the fire of chaos, adjusting design in the moment and holding space for some anger and frustration that unexpectedly arose within the group because of the collaborative leadership we had been growing throughout the planning process.

Infusion did not end in a nice tidy wrapped up bundle and Lea Bryden, myself and the team were good to leave it that way while taking away the gems that guided the development of My Leadership – a truly unique leadership development initiative inside of Capital Health with a bold vision and goals that has since had 500 leaders complete and won a number of regional and national awards.
Citizen Engagement and Accountability Portfolio

In May 2009, the creation of a portfolio within Capital Health with the title of “Citizen Engagement & Accountability” presented a rare opportunity to create something that had no precedent. The portfolio was created in response to the strategic stream of Citizen Engagement that came out of the Strategic Quest work in 2007.

Lea Bryden was tasked with bringing together three functional areas under this new portfolio: Marketing and Communications, Community Health Boards and Patient Representatives. In looking across the country, they found themselves virtually alone as there were no models to inform the portfolio development.

In January 2010, Kathy Jourdain and Tony Case, through Shape Shift Strategies Inc., were contracted to assist in bringing this portfolio together. The intent was to truly create a new portfolio with collective purpose, principles and streams of work and not just perpetuate the three existing functional areas under a new name. Some of the functional work would be the same and new work would emerge through the process but all of it would be informed by the collective purpose.

This work was given context and framing by the following pre-existing pieces of work:

- Our Promise
- Declaration of Health
- My Leadership: Being, Caring, Doing
- Citizen Engagement Strategic Stream
- 2013 Milestones

In addition to wanting to honour CEO Chris Power’s intention in asking the question: “What kind of future could we create if the vision of Our Promise and belief in our Declaration of Health showed up at each of our touch points in the course of our day?”, Lea also wanted to uncover the unique gifts and contribution of each member of the portfolio and understand how they came together as a collective. It was also very much a mechanism to create a cultural shift to even greater accountability.

This process invited a design team to co-design the process. There was initially a very specific invitation to a member of each of the three functional areas. As the process unfolded participation in the design process was completely open and transparent and those with the greatest interest and passion continued to participate in the process. Some people showed up in the beginning because they thought they should and then kept showing up because they saw how their contribution directly influenced the design of each session.

This work took place over a period of four or five months to establish collective purpose, principles, priorities, and strategies. It took into account other work that was underway in the organization, incorporating things like the budget planning process or the response to Capital Health’s community engagement recommendations right into the process so the portfolio could learn how and when to respond as portfolio to other moving parts of the organization.

We knew we were making headway when we hit the groan zone. We had collective purpose and principles articulated and we began to hear, “Oh good. We have what we need. Can we be done? Can we get back to our regular work now?” This was a signal to push back. Lea did this by asking a simple question, “Where are we seeing evidence of our collective intention at work?” The responses were amazing, informative and represented a turning point.

A philosophy of our work as consultants was to transfer collaborative leadership skills into the portfolio so it could flourish once our involvement came to an end. The portfolio created a transition team to continue to guide the work and this team is also working collaboratively.

A key contributor to the success of this initiative was Lea’s willingness to foster collaborative leadership and her openness to growing her own awareness and skills in the process. Like all significant culture shift initiatives, there are certainly bumps along the way. But there is lasting change in the way this portfolio views itself, understands its work and engages with the public.
Visa is often cited as an early prototype of chaordic organization. Despite Dee Hock’s caution that the design is “at best a third right,” the story is both inspiring and instructive. What follows is an abbreviated rendition. For complete history, please read Birth of the Chaordic Age, by Dee Hock.

A troubled industry
In 1958, Bank of America issued 60,000 credit cards to the residents of Fresno, California. After years of losses, the program became profitable, and the bank blanketed the state with cards. In 1966, several California banks countered by launching Mastercharge. In turn, Bank of America began franchising BankAmericard.

Other large banks launched proprietary cards and offered franchises. Action and reaction exploded. Banks dropped tens of millions of unsolicited cards on an unsuspecting public with little regard for qualifications. Within two years, the infant industry was in chaos. Issuing banks were thought to be losing hundreds of millions of dollars, politicians were alarmed, the public was exasperated, and the media was criticizing everyone involved.

An intractable problem — and incredible opportunity
In 1968, as a vice president of a small bank in Seattle franchised to offer BankAmericard, Dee Hock became involved in the formation of a complex of licensee committees to look into the situation. The problems were far worse than imagined — far beyond any possibility of correction by the existing system.

It was necessary to reconceive, in the most fundamental sense, the concepts of bank, money and credit card, and to understand how those elements might evolve in a micro-electronic environment.

Three bank managers joined Hock to begin the process of re-conceptualization. There followed days and nights of intense discussion. They could agree on nothing and were most conflicted by two questions: What is it that we want to accomplish? How will we organize it? Their deliberations led nowhere. The group was ready to throw in the towel when one of them said, “I’m beginning to think I don’t know what an organization is.” Blank looks all around. They then began to explore what they considered to be the nature of organization. As the discussions continued, several conclusions emerged.

Money had become nothing but alphanumeric data recorded on valueless paper and metal. It would become data in the form of arranged electrons and photons that would move around the world at the speed of light, at minuscule cost, by infinitely diverse paths, throughout the entire electromagnetic spectrum. The concept of “credit card” was inadequate. Credit cards had to be reconceived as a device for the exchange of monetary value in the form of arranged electronic particles. Demand for that exchange would be lifelong and global, 24 hours a day, seven days a week, wherever the customer happened to be. Perceptions swiftly changed.

Embedded in what had seemed a hopeless problem was an incredible opportunity. Any organization that could globally guarantee and clear monetary information in the form of arranged electronic particles in every monetary value in the world would have the market — every exchange of monetary value in the world — that staggered the imagination. But a major problem remained.
No bank could do it. No stock corporation could do it. No nation-state could do it. In fact, no existing form of organization could do it. It would require a transcendental organization linking together in wholly new ways an unimaginable complex of diverse financial institutions, individual customers, merchants, communication companies, suppliers and government entities. It was beyond the power of reason or the reach of the imagination to design such an organization or to anticipate the problems and opportunities it would face.

Yet, Hock refused to give up. He noted that evolution routinely created much more complex organizational patterns — rain forests, marine systems, body, brain, immune system — with seeming ease. The group simply hadn’t “peeled back the onion” far enough.

A powerful purpose and set of principles
With that perspective in mind, they decided to reverse the normal process of immediately asking what the practices of the organization would be. Instead, they began to ask themselves what would be the purpose and principles — its institutional genetic code — which would allow a new kind of institution to emerge and, in effect, to create and develop itself.

They focused on a single question:
If anything imaginable were possible, if there were no constraints whatever, what would be the nature of an ideal organization based on biological organizing principles to create the world’s premier system for the exchange of monetary value?

Slowly, a dozen or so principles emerged. For example:

**Power and function must be distributive to the maximum degree.** No function should be performed by any part of the whole that could reasonably be done by any more peripheral part, and no power vested in any part that might reasonably be exercised by any lesser part.

**It must be self-organizing.** All participants must have the right to organize for self-governance at any time, for any reason, at any scale, with irrevocable rights of participation in governance at any greater scale.

**Governance must be distributive.** No individual, institution, or combination of either or both, particularly management, should be able to dominate deliberations or control decisions at any scale.

**It must seamlessly blend both cooperation and competition.** All parts must be free to compete in unique, independent ways, yet be linked so as to sense the demands of other parts, yield self-interest and cooperate when necessary to the inseparable good of the whole.

**It must be infinitely malleable, yet extremely durable.** It should be capable of constant, self-generated, modification of form or function, without sacrificing its essential purpose, nature or embodied principle, thus releasing human ingenuity and spirit.

**It must be cooperatively and equitably owned.** All relevant and affected parties must be eligible to participate in functions, governance and ownership.

After drafting the principles, none of the four believed such an organization could possibly be brought into being. A concentrated, two-year effort involving people throughout the industry and at all levels within individual banks proved them wrong. In June 1970, the organization that would come to be known as Visa came into being.
A Remarkable Organizational Concept

In the legal sense, Visa is a non-stock, for-profit, membership corporation. In another sense, it is an inside-out holding company in that it does not hold but is held by its functioning parts. The institutions that create its products are, at one and the same time, its owners, its members, its customers, its subjects and its superiors. It exists as an integral part of the most highly regulated of industries, yet is not subject to any regulatory authority in the world.

If converted to a stock company, Visa would have an astronomical market value, excluding its thousands of affiliated entities. But it cannot be bought, raided, traded or sold, since ownership is in the form of non-transferable rights of participation. However, that portion of the business created by each member is owned solely by them, is reflected in their stock prices and can be sold to any other member or entity eligible for membership.

It espouses no political, economic, social or legal theory, thus transcending language, custom, politics and culture to successfully connect a bewildering variety of more than 21,000 financial institutions, 16 million merchants and 800 million people in 300 countries and territories. Annual volume of $1.4 trillion continues to grow in excess of 20 percent compounded annually. A staff of about 3,000 scattered in 21 offices in 13 countries on four continents provides product and systems development, global advertising and around-the-clock operation of two global electronic communication systems with thousands of data centers communicating through nine million miles of fibre-optic cable. Its electronic systems clear more transactions in one week than the Federal Reserve System does in a year.

It has gone through a number of wars and revolutions, the belligerents continuing to share common ownership and never ceasing reciprocal acceptance of cards.

It has multiple boards of directors within a single legal entity, none of which are inferior or superior, as each has jurisdiction over certain areas or activities. No part knows the whole, the whole doesn’t know all the parts and none had any need to. The entirety is largely self-regulating.

In less than five years, Visa transformed a troubled product with a minority market share into a dominant market share and the single most profitable consumer service in the financial services industry. Visa returns as much as 100 percent on its members’ invested capital, while at the same time reducing by more than 50 percent the cost of unsecured credit to individuals and merchant cost of handling payment instruments.

Its products are the most universally used and recognized in the world, yet the organization is so transparent, its ultimate customers, most if its affiliates and some of its members do not know how it functions or how it is structured.
“Words create worlds”
– Wittgenstein

There sometimes is a thin line between specific language which refers to a specific reality and jargon, which can turn people off. Here are translations into common language of some of the specific language items used in this workbook.

<table>
<thead>
<tr>
<th>Art of Hosting vocabulary</th>
<th>Explanation</th>
<th>Alternative (common) language</th>
<th>Comments</th>
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<tbody>
<tr>
<td>Hosting</td>
<td>Facilitating</td>
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</table>

Facilitating focuses more on the techniques, hosting entails the consciousness with which you are doing it — consciousness of yourself, the others and what is common to all and beyond everyone

Entering the field
Starting the process

Methodologies kiosk
Session dedicated to presenting different methodologies at the request of participants

Circling, PeerSpirit circling
Facilitation process where participants sit in a circle

Check-in
Opening moment of a meeting, gathering, seminar . . . which aims at creating a transition with the previous contexts of the participants and enables everyone to settle down, connect with and get to know each other and to focus everyone's attention on the topic of the discussion

Opening of the meeting
<table>
<thead>
<tr>
<th><strong>Check-out</strong></th>
<th>Closing of a meeting, gathering, seminar . . . which aims at capitalizing on individual and collective learnings and at creating a transition towards the next contexts of the participants</th>
<th>Closing of the meeting</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Hold potential</strong></td>
<td>Have the potential of</td>
<td></td>
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<tr>
<td><strong>Open Space technology</strong></td>
<td>Facilitation process where the agenda is created by the participants with their passion and responsibility. Those who want to call sessions on the basis of questions, issues or opportunity they wish to explore with others. They become the hosts of their sessions. The other participants decide with their feet where they feel called to participate.</td>
<td>Open Space format</td>
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<tr>
<td><strong>Engage deeply and creatively</strong></td>
<td>Get intensely and creatively involved</td>
<td></td>
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<tr>
<td><strong>Transformative experiences</strong></td>
<td>Important development steps</td>
<td></td>
</tr>
<tr>
<td><strong>Raising to one’s next level</strong></td>
<td>Going through an important development step</td>
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<tr>
<td><strong>Catalyze effective working conversations</strong></td>
<td>Maximize the benefits of conversations at work</td>
<td></td>
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<tr>
<td><strong>Truly invite organizations/people</strong></td>
<td>Invite organizations/people to focus on what really matters to them rather than to formal meetings</td>
<td></td>
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<tr>
<td><strong>Invite organizations to thrive in times of swirling change</strong></td>
<td>Support organizations to do well what they really should be doing in times of ever-faster changes</td>
<td></td>
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<tr>
<td><strong>Sense the need</strong></td>
<td>Sensing the need with all your senses, your whole being and consciousness rather than “understanding” with your mind only</td>
<td>Understand/analyze the need</td>
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<tr>
<td><strong>Prepare the field</strong></td>
<td>Prepare a conversation in all its dimensions — understanding the needs, inviting people, designing the conversational process with facilitation questions, preparing the recording</td>
<td>Prepare the event</td>
</tr>
<tr>
<td><strong>The “breath” of divergence and convergence — of breathing in and breathing out</strong></td>
<td>Phases of opening up (diverging) and closing down (converging) in brainstorming and creative reflection processes</td>
<td>The phases of divergence and convergence</td>
</tr>
<tr>
<td><strong>Every process goes through several such breathing cycles</strong></td>
<td>Succession of cyclic phases of opening up (diverging) and closing down (converging) in every process</td>
<td>Every process goes through several such phases</td>
</tr>
<tr>
<td><strong>The four-fold way of hosting</strong></td>
<td>Four aspects/dimensions of hosting</td>
<td></td>
</tr>
<tr>
<td><strong>Hosting yourself</strong></td>
<td>Be aware of and maintain one’s energy level in order to be capable of achieving one’s objectives</td>
<td>Take care of yourself</td>
</tr>
<tr>
<td><strong>Be willing to sit in the chaos</strong></td>
<td>Be comfortable with chaos, trusting that order and new ideas and opportunities can emerge from it</td>
<td></td>
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<tr>
<td><strong>Sit in the fire of the present</strong></td>
<td>Focus on what is here and now and learn from it</td>
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</tr>
<tr>
<td><strong>Practice conversation mindfully</strong></td>
<td>When discussing, attend to what is happening in yourself, in the others and between everyone</td>
<td></td>
</tr>
<tr>
<td><strong>Hold space</strong></td>
<td>Be open and attend to everything that emerges from a situation</td>
<td>Attend to what is emerging</td>
</tr>
<tr>
<td><strong>Social technologies</strong></td>
<td>Facilitation processes aiming at connecting people together around what matters to them</td>
<td>Facilitation processes/ formats</td>
</tr>
<tr>
<td><strong>Harvesting</strong></td>
<td>Record, collection — the act of recording what is discussed and reporting on it</td>
<td></td>
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</tbody>
</table>
Further Resources***

Art of Hosting: www.artofhosting.org - at this site you can sign up for the Art of Hosting listserv where a variety of conversation threads emerge and where you can put out requests for help on specific topics

Art of Hosting community site: http://artofhosting.ning.com/ where you can sign up, create a profile and also find a wealth of information

Googling and youtube videos for any of the methodologies or frameworks will take you to a wealth of resources!

Books:

Baan, Christopher, Long, Phil and Pearlman, Dana
The Lotus: a Practice Guide for Authentic Leadership towards Sustainability
http://www.thelotus.info/what-we-do/written-guidance/

Baldwin, Christina
Calling the Circle — The First and Future Culture
Storycatcher — Making sense of Our Lives through the Power and Practice of Story
The Circle Way — A Leader in Every Chair — Christina Baldwin and Ann Linnea,
www.peerspirit.com

Brown, Juanita with David Isaacs & the World Café Community
The World Café — Shaping Our Futures Through Conversations That Matter
www.theworldcafe.com

Cooperrider, David and Srivastva (2000)
Appreciative Inquiry: Rethinking Human Organization Toward a Positive Theory of Change
www.appreciativeinquiry.case.edu

Whitney, Dianna and Trosten-Bloom, A.
The Power of Appreciative Inquiry: A Practical Guide to Positive Change
Owen, Harrison
Open Space Technology — A User’s Guide
Expanding our now — The Story of Open Space Technology
The Spirit of Leadership — Liberating the Leader in Each of Us
www.openspaceworld.org

Corrigan, Chris
The Tao of Holding Space
Open Space Technology — A User’s Non-Guide (with Michael Herman)
www.chriscorrigan.com
Otto Scharmer  
'Presence: Human Purpose and the Field of the Future  
www.theoryu.com  
www.presencing.org  
www.ottoscharmer.com

Holman, Peggy, Tom Devane  
The Change Handbook (Second Edition Available this Fall)

Isaacs, William  
Dialogue and the Art of Thinking Together

Kaner, Sam et. al.  
The Facilitator's Guide to Participatory Decision Making

Senge, Peter  
The Fifth Discipline  
The Fifth Discipline Field Book (with Ross, Smith, Roberts, and Kleiner)  
The Art and Practice of Learning Organization  
The Dance of Change (with Art Kleiner, Charlotte Roberts)

Wheatley, Margaret J.  
Leadership and the New Science:  
Turning to One Another  
Finding Our Now  
A Simpler Way (with Myron Kellner-Rogers)

Etienne Wenger  
Communities of practice: learning, meaning, and identity