



HOW DO YOU SUCCESSFULLY ENGAGE YOUR COMMUNITY

Verdant Health Conference, 2/27/17, 1:25pm—2:15pm

Ted Lord, Senior Partner, The Giving Practice, tlord@philanthropynw.org

Goals

- Begin a shared cross-sector inquiry into how to better engage community voice
- Develop shared context, language, concepts, as well as better understanding of differing interests, assets and constraints of key community partners
- Begin to map current openings, obstacles and opportunities for better community engagement
- Participants leave feeling connected, heard, renewed, energized, inspired!

1:25—1:45 Welcome & Opening Panel

Some Key Concepts

“Training” vs “Learning in Peer Networks”

Leveraging loose and tight connection

Conversation vs. Meeting

Technical vs Adaptive work

Emergent Planning

When best to engage community

Collective Action

Framing Remarks/Discussion by Panel: Contexts & Case for Today’s Dialogues

Speakers from local School District/Local Government/Nonprofits

Why I Care about Engaging Community Voice

One Bright Spot

One Question or Stuck Place I’m Inviting Help in Discerning

1:45—2:05 Wisdom in the Room; Leveraging Loose Connections

1:2:4:ALL

1: Spend 2 minutes journaling or reflecting on Opening Panel Questions

Why I Care about Engaging Community Voice

One Bright Spot

One Question or Stuck Place I’m Inviting Help in Discerning

2: Find a partner you don’t know and share for 2 minutes each (*4 minutes total*)

4: Your pair joins with another pair and shares for 2 minutes each (*8 minutes total*)

All: Participants invited to share highlights in large group

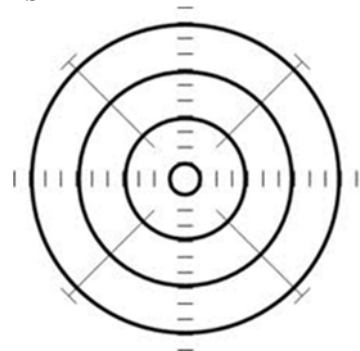
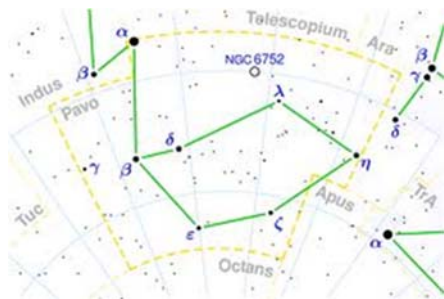
2:05—2:15 Next Steps to Try / Offers & Requests

CONVERSATION OR MEETING

Conversation	<p>Creation of shared meaning; exposure of alignment and discontinuities; flavored by curiosity and inquiry</p> <ul style="list-style-type: none"> • Holism • focus on outcomes (“who for?”; “so what?”) • listening for what’s emerging in the center of the room
Meeting	<p>Creation of action steps; interchanges flavored by need to influence results: persuasion; lobbying</p> <ul style="list-style-type: none"> • Reductionism • focus on outputs (“how much?”; “by when?”) • listening for which side is winning

Conversation is a meeting of minds with different memories and habits. When minds meet, they don't just exchange facts: they transform them, reshape them, draw different implications from them, engage in new trains of thought. Conversation doesn't just reshuffle the cards: it creates new cards.” —Theodore Zeldin

DESIRED OUTCOME; LEARNING POSTURE; EXECUTION STANDARDS



LEARNING CONSTELLATION
Organizational culture work
5-6 fence posts of core belief
Discovery & Sense Making



HOLDING MORE, LOOSELY
80% gets the job done
Mistakes seen as evidence of learning
Risk pursuit

EXECUTION BULLS-EYE
Project management work
Knowable outcome metrics
Action & Evaluation



HOLDING LESS, TIGHTLY
100% expected and encouraged
Mistakes to be avoided
Risk management

TECHNICAL VS ADAPTIVE

“Leading Boldly” http://www.ssireview.org/pdf/2004WI_feature_heifetz.pdf

Technical Problems

- Problem is well defined
- Answer is known
- Implementation is clear
- Solution can be imposed by a single organization

Examples

- Funding scholarships
- Building hospitals
- Installing inventory controls for a foodbank
- Developing a malaria vaccine

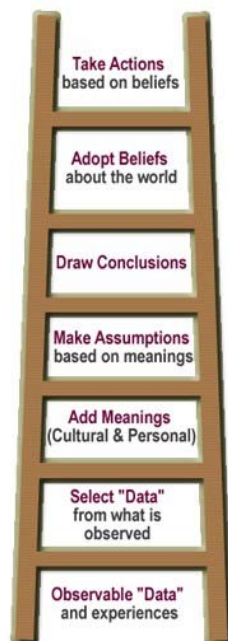
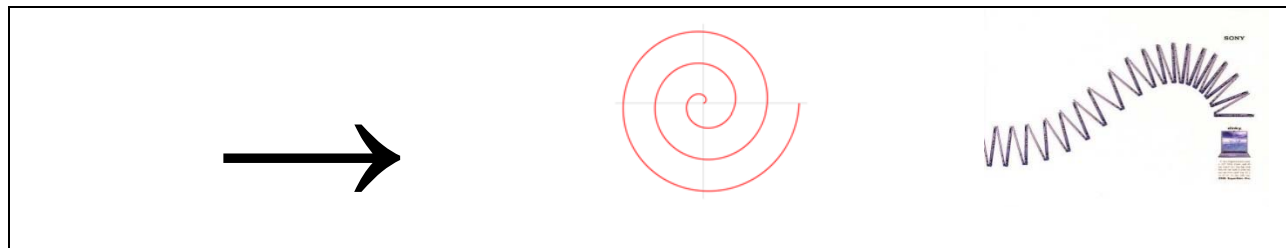
Adaptive Challenges

- Challenge is complex
- Answers are not known
- Implementation requires learning
- No single entity has authority to impose solution on the other stakeholders

Examples

- Reforming public education
- Providing affordable healthcare
- Increasing organizational effectiveness
- Achieving 80% vaccination rates within a malaria-infected region

ACKNOWLEDGING ACTION OR REFLECTION PREFERENCE



Source: *The Fifth Discipline Fieldbook*, Senge et al, 1994.

Ladder of Inference

Emergent strategy accepts that a realized strategy emerges over time as the initial intentions collide with, and accommodate to, a changing reality.



Source: Henry Mintzberg, Sumantra Ghoshal, and James B. Quinn, *The Strategy Process*, Prentice Hall, 1998

http://www.ssireview.org/up_for_debate/article/strategic_philanthropy

Emergent strategy in action

<http://www.fsg.org/publications/strategic-philanthropy-complex-world>

TRADITIONAL STRATEGY: *NECESSARY BUT NOT ALWAYS SUFFICIENT*

- clear goals
- testable hypotheses
- tracking of success metrics
-

Plan → Act → Check

EMERGENT STRATEGY: *RIGOR + FLEXIBILITY*

- learning agenda
- systems mapping
- continuous sensing
- course-correcting

Probe → Sense → Adapt

ENGAGING THE COMMUNITY IN GROUPS OR GATHERINGS

WHERE IS THE EXPERTISE: IN THE ROOM, WITH OUTSIDE EXPERTS; BOTH?

Reflection & Harvesting: story telling; evaluation materials or context maps

Outside Expertise: panel; user experience fishbowl; celebrity interview;

3rd Objects as prompts: essays; You Tube or Ted videos;

WHERE & WHEN YOU ENGAGE COMMUNITY MATTERS

Milieu

At your neutral florescent light-office space

At conference room of participant organization

At someone's home

At a coffee shop or bar

Outdoors at a picnic table

Access

Weekday, weeknight or weekend

Child-care provided or stipended

Transportation provided or stipended

Translation and/or Interpretation

HOW YOU SET UP THE SPACE MATTERS

Big Circle

Rows

Long Single Table (board room style)

Pods / Tables of 4-6

HOW YOU OPEN MATTERS

Welcoming signals (name tags)

Food and beverage

Materials and agenda

Goals for meeting

Check-In

REMEMBER TO BE FLEXIBLE WITH AGENDA (*even if you spent hours making it perfect*)

Even the most perfect agenda does not survive contact with reality

Build an agenda to see you through an unresponsive crowd—you can always drop stuff

If they talk more that's the goal, not completing your agenda design

The final half of any agenda should be the most flexible

Have sections/activities you can eliminate or combine

Do not drop the check-out or harvest at the end

Even asking for one word from each participant helps the group sense its work
and gives a sense of closure

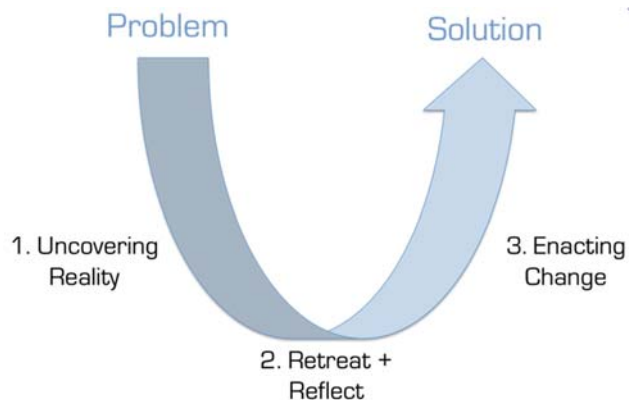
START AT THE LEVEL OF IDENTIFY NOT ACTION

What level are you trying to reach people and engage them? Parker Palmer

<http://www.couragerenewal.org/> speaks of this as

- How
- What
- Why
- Who

THEORY U



Temptation for us all is to try and go immediately from top left of U to top right of U without taking the time to reflect, drop-in, inquire at a deeper systems level and invite innovation.

50% OF ANY RELATIONSHIP IS STILL YOU

What is your intention? Core strengths? Comfort Level (with risk; conflict; ambiguity, etc.)?
How do you see your role as a facilitator? What will constitute success?

WHAT DO YOU SEE YOUR ROLE AS?

What are you responsible for?
How far is enough? How fast is enough?
Whose work is it?

WHAT BALANCE DO YOU WANT TO STRIKE?

Lecture
Solo Reflection & Journaling
Small Group
Movement

WHAT LEARNING STYLES DO YOU WANT TO REACH/INCORPORATE?



USE OF THIRD OBJECTS TO PROMPT DISCUSSION & REFLECTION

EXAMPLES OF THIRD OBJECTS

- Poems/Essays /Prose
- Music
- Art
- You Tube Videos
- TED Talks

CREATING THIRD OBJECTS TO PROMPT DISCUSSION & REFLECTION

- Family Crest Exercise
- Visual Recording <http://www.grove.com/site/index.html>
- Templates or Graphic Images to fill in

GAMES & KINESTHETIC EXERCISES TO PROMPT DISCUSSION & REFLECTION

- Marshmallow Challenge <http://marshmallowchallenge.com/>
- Imaginary Ball Toss

YEASTY QUESTIONS

- What sense are you making of what you're hearing / noticing?
- Where do you see opening in the system that is inviting shift?
- What is our learning agenda?
- What will success look like?
- Are there any interesting outlier ideas/noticings that have energy for you?
- Are there patterns or models from a different discipline, profession, culture or domain that might inform our thinking?

USEFUL ENGAGEMENT PRACTICES

- Dialogue Walks
- Offer & Requests
- Heresy Hoe Down
- Blind-Faith Bets
- 3rd Object Discussions (articles/videos/poems)
- Group Consult
- Troika Consulting
- What Chapter is Next Story Boards

From "Liberating Structures" www.liberatingstructures.com

- User Experience Fishbowls
- Celebrity/Peer Expert Interviews
- Appreciative Interviews
- Impromptu Networking
- 1-2-4-All
- What, So What, Now What?
- Conversation Café
- Open Space

WHAT DO YOU DO WHEN THINGS GO SOUTH

- Never be afraid to take a deep breath to refocus or pause
- Ask for Help
 - “Can one of you riff for a minute or two on whatever it is we’re talking about? I need a moment to return to my body”
- Ask for Their Reflections
 - “Can someone help identify where and why the conversation has shifted?”
 - “Let’s re-orient as I’m feeling a bit foggy. What in this conversation has seemed most useful or promising to you so far”
 - “What else should I be saying” or “What are you not hearing that you would expect to?”

HOW TO HANDLE PARTICIPANTS MOMENTARILY (OR CONSISTENTLY) DIFFICULT

- If someone is presenting an opposing point of view and seems to need to feel heard beyond reason
 - Frame it as a “generative polarity” or “duality” or “paradox” where opposites can both be true and picking a spot on the continuum is about trade-offs and balancing
 - Check in one-on-one during break
 - Do a pro/con sheet before a final vote
- If someone is dominating or over-talking
 - Remind of the value of full and democratic participation
 - Use circular/Montessori listening so everyone has a turn to speak into the circle
 - It can be useful to have an explicit rule that any one individual won’t speak again until others have spoken (talking sticks can help here)

IF POSSIBLE

- Co-present and co-convene: working with a partner is a game-changer
- Have someone else take notes: as a facilitator you are too busy reading the room
- Dry run all AV & technology
- Schedule an all-day retreat for an afternoon and the following morning
 - “Sleeping on it” helps integrate and creates synthesis for participants
- One-on-one interviews with participants before gathering can
 - Build trust
 - Participants will give you some breathing room to reflect back their issue
 - Your style will not be a surprise and they will have an initial level of comfort
 - Identify key concerns and dynamics

SPECIAL CIRCUMSTANCES

- Telephone facilitation
 - Requires a facilitator to call on participants by name
 - More than ninety minutes is doomed
- Video Conferencing
 - Best if all are on screen vs some in a room together and others remote

Prompts for Facilitating Inquiry & Reflection

Starting from what's working, or from a community's assets and not deficits, helps invite in the energies that want to flow and the change that wants to happen.

- Go slow to go fast—time spent building trust and alignment in groups, as well as planning time that articulates shared identity and values, makes for smoother sailing in the action and implementation phases.
- Check-ins (at the beginning, middle, and end) help individuals notice and accommodate the temperature, flavor, and pace of the group as a whole.
- Dip into the intention you are bringing to any group. Are you more invested in trying to move a group to a specific destination or are you open and curious to where the group's energies and passions are? What is your role(s)? How will you evaluate success—full engagement or rapid progress or both? Do participants leave the meeting with more energy than they arrived?

Appreciating Assets and What's Working

- What's giving you hope? (in the work; field; culture; in this place or particular moment)
- Speak to one thing that gave you real energy

Seeing Systems

- Where do you see parallels or perspectives from other fields or sectors?
- What would happen if this group went away if the effort was stopped?

Notices Patterns & Trending

- Bring or draw an image that speaks to a key aspect of our endeavor.
- Elephant hunting: is there an issue(s) we are all avoiding?
- Is there a sword you are willing to die on in our work together?

Sensing Timing & Temperature

- What's your personal weather today?
- What season is the organization in or what chapter is our project in?

For the Participant as a Whole Person

- Talk about a time you felt liberated
- Where do you feel the most personal resistance? Excitement?

Making Space for Innovation

- What is one thing we are currently doing you know doesn't work?
- If you were going to design "x" to be sure it failed, what would you do or include?
- What is one thing you know is a game-changer, even if you don't have evidence?

Making Visible Ambiguity & Not Knowing in Complex Systems

- What is one thing you can't figure out?
- What is one question someone asked that you couldn't answer?

Hosting Successful Convenings

Core Disciplines to Promote Authentic and Effective Gatherings

"Conversation is a meeting of minds with different memories and habits. When minds meet, they don't just exchange facts: they transform them, reshape them, draw different implications from them, engage in new trains of thought. Conversation doesn't just reshuffle the cards: it creates new cards." —Theodore Zeldin

In the last 20 years there has been a sea-change in the theory of how to host successful convenings of stakeholders and professional teams. Engaging the knowledge and wisdom in the room has become recognized as an essential adjunct to presentations based on expertise and findings from the field. People telling stories from their experience, in all their messiness, have proven a profound complement to metrics and learnings power-pointed from the podium.

Harnessing and harvesting the practical experience of those on the ground can build the collective will needed to propel movements, especially in fields where key partners are siloed into separate organizations or constituencies. Successful convenings give equal emphasis to participants sifting the knowledge they arrive with into shared wisdom, in addition to the more customary additive pedagogy of presenting more information

Giving agenda space and time for groups to wrestle with shared inquiry requires conveners to trust the competencies and capacities of their invitees, surrendering some degree of command and control to the shifts and surprises that emerge when folks are asked what needs most to be said, or what wants to come to be.

Core theoretical models for this emerging school of applied engagement include

- **Appreciative Inquiry (AI).** Developed by David Cooperrider and colleagues in 1987, AI's extensive research reveals the gift of an appreciative inquiry – questions, interviews, stories – to uncover strengths and possibilities as a basis for illuminating and inspiring powerful individual and collective action. AI is a particularly valuable form for engaging diverse stakeholders across a domain of common concern.
www.appreciativeinquiry.cwru.edu
- **Open Space Technology (OST).** Created by Harrison Owen in 1985, OST invites people to take responsibility for what they love. Because of its power to quickly engage diverse people in self-organizing around what is important to them, it is extremely effective at uncovering unexpected insights, new connections, often creating clarity and commitment to action. www.openspaceworld.org
- **The World Café.** Shaped by Juanita Brown and David Isaacs, TWC builds powerful relationships and community around their burning questions so people notice their

patterns. TWC enables voice in an intimate setting in which people begin to experience themselves as a fractal of the whole. www.worldcafe.org

- **Dialogue.** Brought into modern practice by physicist David Bohm and organizational theorist Peter Senge (*Presence & Theory U*). *Dialogue* develops the capacity to sense together, whereas *discussion* is often about persuasion. Dialogue is “Yes, and....”; Discussion is “No, but....” www.solonline.org
- **Sequential Listening in Circle.** Reminds participants of the unique lenses each brings to the shared endeavor. Encourages deep listening, as participants are only allowed to speak in turn. Engages introverts while offering limits to over-talkers. <http://www.co-intelligence.org/P-listeningcircles.html>
- **Storytelling.** Can lift us beyond the borders of individuality to imagine realities of other people, times and places. It can also help surface the underlying assumptions that drive our organizations or identities. Timelines and narratives help reflect stages of organizational development www.storycatcher.net

Taken together, these disciplines are a powerful testament to what consistently occurs when people are invited to express what is being called from their deepest inner resources. In the process of being present to each other, people often experience a remarkable discovery: that what is most personal is also most universal. New ideas and connections frequently emerge; people begin caring for themselves, others, and the whole, inspiring coherent, committed action in service to meaningful purpose. Honoring engagement underlines a commitment to seeding and cultivating a true community of practice, and emphasizes to invitees that the conveners are co-learners and in this together.



1. Downloading, polite talk, low challenge to status quo
2. Debate, talking tough, argument, often with polarized opinions and friction
3. Dialogue through inquiry, curiosity, exploring difference, challenging mental models
4. Generative dialogue, unleashing collective creativity, new collective sense-making

“Storytelling is the human soul made visible.”
Donald Davis

Here are prompts you can use to spark the storytelling imagination of people in a story circle. These are inspired in part by story prompts from Donald Davis at www.ddavisstoryteller.com

























- Tell us about a trip you’ll never take again.
- What’s an important piece of advice someone once shared with you?
- Introduce us to one of your mentors and tell us why this person is or was so influential with you?
- Describe a time in your community work when you felt you were about to fail but didn’t or were about to succeed but didn’t.
- Share with us a story about forgiveness.
- The word “philanthropy” is derived from the Latin words: “philos” which means love, and “anthros” meaning human kind. Tells us a story about the love of human kind.
- Tell us about a childhood experience that greatly influenced what you do in life today.
- If you’re going to do something important, work with people who are like-hearted rather than like-minded. Share an example of this.
- Introduce us to one of your favorite relatives and tell us why she or he is so special.
- Tell us about a time when you were really lucky.
- Describe something on your desk that means a great deal to you...and why.
- Tell us about a person or a place that gives you great pride.
- Tell us a story about gratitude.
- Tell us about an expensive lesson.

Liberating Structures Menu

Free! Each of the 33 technique described; video of delivery; pre-written PowerPoint slides.

Suggested sequences of different liberating structures

www.liberatingstructures.com

LS Menu 	Wicked questions 	What³ debrief 	Min specs 	Heard, seen respected 	What I need from you 	Integrated autonomy 
Design elements 	Appreciative interviews 	Discovery and action dialog 	Improv prototyping 	Drawing together 	Open space 	Critical uncertainties 
1-2-4-All 	TRIZ 	Shift & share 	Helping heuristics 	Design storyboards 	Generative relationships 	Ecocycle 
Impromptu networking 	15% solutions 	25 : 10 crowdsourcing 	Conversation café 	Celebrity interview 	Agree/certainty matrix 	Panarchy 
9-whys 	Troika consulting 	Wise crowds 	User experience fishbowl 	Social network webbing 	Simple ethnography 	Purpose to practice 

SOURCES FOR ENGAGING COMMUNITY

Liberating Structures	www.liberatingstructures.com
World Café	www.theworldcafe.com
Open Space	www.openspaceworld.org
Art of Hosting	www.artofhosting.org
Theory U	www.theoryu.com
Appreciative Inquiry	http://appreciativeinquiry.case.edu
Mind Mapping	http://www.mindmapping.com/
Graphic Facilitation	http://www.grove.com
Future Search	http://www.futuresearch.net/
Chaordic Commons	http://www.chaordic.org/
Scenario Planning	http://www.well.com/~mb/scenario_planning/#commercial
Gracious Space	http://ethicalleadership.org/programs/gracious-space
Center for Civic Reflection	http://civicreflection.org
Center for Courage & Renewal	www.couragerenewal.org
Berkana Institute	http://berkana.org
National Coalition for Dialogue & Deliberation	http://ncdd.org
terrific “Participatory Processes”	http://ncdd.org/rc/item/category/participatory-practice
Terrific Collection of Links & Facilitation Resources	http://chriscorrigan.com/parkinglot/?page_id=958
<u>Philanthropy Consulting Firms</u> (often with free, grant-funded content)	
The Giving Practice	https://philanthropynw.org/givingpractice
FSG	http://www.fsg.org
Monitor	http://monitorinstitute.com
Arabella Advisors	http://www.arabellaadvisors.com
Bridgespan	http://www.bridgespan.org
The Philanthropic Initiative	http://www.tpi.org
Oxford Leadership Academy	http://www.oxfordleadership.com
Dialogos	http://dialogos.com
La Piana Consulting	http://www.lapiana.org