POWERHOUSE CONVENING

New Doorways to Funder and Community Engagement

THE GIVING PRACTICE

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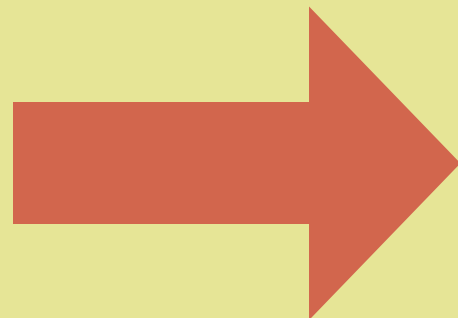
WHAT'S IN THE GUIDE

This guide is for people who want to help groups go together for good. It offers tools and practices for designing and facilitating group conversation, planning and action. It also explores how to be a more effective host, prompter and guide by bringing your best self to the table.

In "The Blind Spot of Leadership," Otto Scharmer quotes a seasoned CEO: "The success of an intervention depends on the interior condition of the intervenor." This is an excellent reminder that helping groups go together for good means paying attention not only to meeting structures and content, but also to our internal mindsets—the tone, identity and intention we bring to engagements.

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After several decades of leadership and facilitation in the nonprofit and foundation world, I have found that convenings have greater impact when they include different doorways for groups to walk through together. Sometimes this means scouting for doorways in the process of opening. Other times it means trying different approaches from a toolbox of activities.

In the pages that follow, you will find practical tools and strategies you can use to support powerhouse convenings. By convening, I mean bringing together a group of people to work on complex problems. You can support a convening in any number of roles—as designer, facilitator, host, participant, funder or all of the above.

What does powerhouse convening look like? It makes room for shared leadership, regardless of anyone's standing. It generates and draws on the power of trusted relationships, shared curiosity and group sensemaking—all of which fosters creativity while avoiding groupthink. It inspires us to pursue issues and insights we might otherwise shy away from. It bolsters courage, passion and co-creation. It creates new opportunities for action. It makes a difference that none of the participants could have achieved individually.

Each of these 10 sections provides a different doorway into the work of supporting powerhouse convening. How do you help groups be present and curious from the start? How do you build trust? What are the best ways to help groups connect to a shared purpose? What do you do when groups encounter bottlenecks, as they inevitably will?

The "Try This" exercises in each section are approaches for helping groups through each particular doorway. They are prompts meant to be adapted—yet they are all grounded by the belief that activating diverse voices and passions in a group ensures more innovative, equitable and sustainable results. This means testing hypotheses and trying actions that are not only co-created by the group, but also reflect both the current operating environment and the lived experiences of participants.

All of this sounds chaotic, messy and discombobulating. It is. Working in our silos may appear efficient—but it's not helping us make headway on many critical issues. Robert's Rules of Order, narrow agendas and "working the plan" have rarely brought the change intractable issues demand.

Designing and facilitating powerhouse convenings require different approaches from running efficient meetings or managing projects. The strategies and approaches sketched in this guide invite you to show up as an adventurer in working "better together." Greater mutuality and interdependence can help us renew the ideal of a shared Commons, civic squares where we engage in the long and proud American tradition of voluntary association for the public good.

—Ted Lord

THE SECRET SAUCE

"Men travel faster now, but I do not know if they go to better things." —Willa Cather

Think of a time when you were working as part of a group and the meetings ran with such ease and impact it seemed magical. What conspired to have things go so well? Are those approaches transferrable to other gatherings?

Yes, they are—but they require skills and mindsets that often challenge linear execution and rigid timelines.

The adventure of co-creation asks for different strengths than executing on objectives. We need to challenge our preconceptions about how progress unfolds when groups work together. We need to be willing to risk shaking the Etch A Sketch clear to create space where new designs and playbooks can be imagined. A group with a list of goals but little energy won't accomplish them. But create a process that gives a group life, and results will bloom.

Building trust can often feel inefficient, but it's imperative for co-creation. To be sure, inviting new perspectives sometimes leads to a bit of wandering in the wilderness or down the occasional cul-de-sac. A person's sense of calling and understanding of roles can be tested, and even transformed, as we inhabit the worldviews of other participants. We may encounter uncomfortable tensions between our home organization; the culture of the group we are participating in; and our individual beliefs and values.

Despite these disruptions, openhearted welcoming and attending to a group's diverse energies often sparks magic. Paying attention both to what people bring to the room, and what happens when they start interacting can reveal a shared path that is both sustainable and innovative. Powerhouse convening requires more than the rinse-and-repeat of efficient meetings. We are "better together" —though, sadly, not easily or immediately. The secret sauce lies in how any group realizes its potential to create a whole greater than the sum of its parts.

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Tending to the whole in this way means facilitators must suspend detached professionalism. Powerhouse convening grows from trusted relationships in the room, and the shared agency that comes when we respect and integrate the differing expertise present. Too often in shared work, we ignore the value of lived experience. Traditional meeting structures discourage the complexity and conflict that can be essential fuel for change. Harnessing broad democratic engagement in any room is not easy. It demands presence and deep listening from facilitators so they can course correct in real time.

Even more, it means learning to always trust the group that's in the room. Magic happens when you, the facilitator, listen for a group's deeper purpose and help name and amplify it. That, in turn, requires you to let go of any need to prove your expertise. Instead, spend your energy watching for lean-in moments that are signposts to where the group needs to go next. Pay close attention when tension or conflict arises. Participants often want to ignore uncomfortable moments, but a steadfast facilitator can deepen the dialogue by asking an insightful question or by inviting a pause for reflection.

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Becoming more fluent in working together calls on us to develop personal mastery in areas many of us might choose to sidestep: radical patience; listening across difference; moving forward in ambiguity; and iterating and prototyping while welcoming the inevitable mistakes that accompany innovation.

Success in convenings is often not about getting the most done in the least amount of time. It requires a commitment to practicing the skills—frequently nonlinear—of shared wayfinding. We know that emergent strategy requires us to think in terms of systems, networks and adaptation. In the same way, powerhouse convening requires groups to practice pattern recognition, system mapping, learning together, iteration and embracing course corrections. We come to see stuck moments and polarized views not as obstacles, but as opportunities for further inquiry, reflection and practicing shared sensemaking.
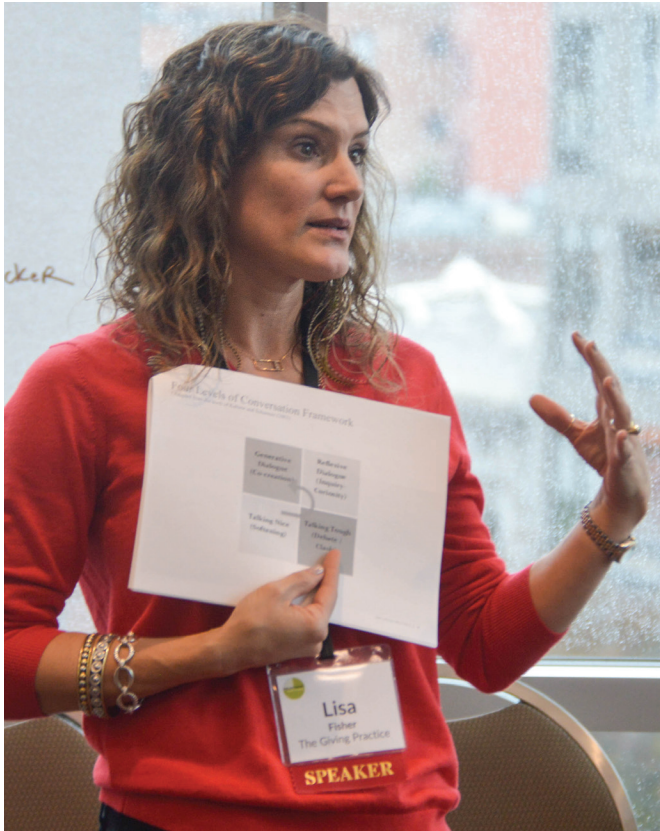
Key Assumptions for Starting and Sustaining Powerhouse Convenings

Groups come to better decisions than individuals on issues that affect a diverse ecosystem of stakeholders.

Experimenting with new ways of **shared seeing is essential to *going together better.*** Participants learn to recognize commonality and hold difference as the group struggles to see the whole of an issue or system through multiple perspectives. Framing an issue from multiple vantage points allows for a shift, from being observers of others' problems, to being actors in a community charged with collectively seeking solutions.

Conversation is action. "When we begin listening to each other, and when we talk about things that matter to us, the world begins to change," Margaret Wheatley writes. Too often, convening organizers program meetings down to the minute, stifling the lived wisdom in the room. This can lead to agendas packed with reviewing data and reports without room for participants to share and make sense collectively.

The ladder must be on the right wall before it's mounted. The principle of "Going slow to go fast" recognizes that sometimes groups come together around one problem only to find that conversations lead them to new places and issues. We need to take the time to download and observe, make sense and adapt if we are going to arrive at transformative approaches. This may also mean making time to grieve and retire old strategies that are no longer relevant.

Not setting out with a final destination in mind creates the most generative road map. In fact, knowing the answers in advance may be a signal that work at hand does not require convening. Admitting we don't know what we don't know models curiosity and humility that stand in sharp contrast to how many of us have been trained to work with others. Openness and vulnerability almost always inspire a "tell me more" response. The path forward emerges and writes itself through courageous inquiry and engagement.

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"The best way to find out if you can **trust** somebody is to trust them." Hemingway's insight can be extended to powerhouse convening—which calls us to champion stewardship over advocacy. Collective wayfinding requires each participant to let what's good for the group temper and constrain personal agendas.

Tending to relationships and feelings is as essential to good outcomes as pursuing analysis and outputs. Effectively holding the container of the group means, for instance, reaching out off-line when you see signs of stress or distress among participants. People want to be seen and heard and witnessed. The littlest "I see you" can sometimes make the difference in how people show up—or whether they continue to show up at all.

Leadership arises from everywhere. How do we invite and make welcome new players and unlikely bedfellows? How do we design and host conversations that unleash the expertise and relationships of all participants? Groups are galvanized when we include and amplify more voices. **Less formal and lateral connections set in motion greater discovery** for the common good.

Some of the types of leadership that can be present:

- **Top Down:** Recognizes the role of traditional hierarchy—as well as its constraints. Encouraging C-suite leadership to leave corner offices and listen from different vantage points can help executives appreciate different perspectives.

- **Bottom Up:** Engages those who have traditionally been marginalized as "end users" or "clients" to contribute solutions and insights from lived experience.

- **Side In:** Invites folks at intersections with other systems to function as boundary-riders and bridge-builders, providing fresh perspectives and innovation.

- **Center Out:** Upends those who may have been buffered into complacency by living in the middle. Experiencing the edges of a system can increase a sense of urgency, inquiry and possibility.

Powerhouse convening demands design and leadership that **honestly articulate and tackle power dynamics and equity**. We must practice allowing conflict and tension to be in the room without letting it derail a group. Considering your intention and position as facilitator is helpful for exposing blind spots. The evolving frame of Doing To → Doing With → Doing As is a powerful starting place for groups to explore the tone they want to operate from.

- **Doing To:** Represents a historical model of working with community—we have the solution and here it is—that doesn't recognize the assets of lived experiences or the right of self-determination. "Do nothing for me without me."

- **Doing With:** Recognizes that relationships are key to successful resource investments. "Giving money without relationships is like pouring water into sand," a Native Alaskan elder once said. While retaining the power differential of "giver" and "recipient," doing with acknowledges and respects the contributions of all parties, and the need for mutuality in pursuing change.

- **Doing As:** Acknowledges that we enter into the work as co-conspirators for the public good. This doesn't mean we are all the same—it does mean we all have a shared stake in the work. It also recognizes our diverse identities as an asset. We may, for instance, participate as a neighbor, funder and parent simultaneously.

Fun, laughter and celebration aren't just nice to have—they are **essential fuels** for going together better. The most crucial metric for any convening is whether participants leave with more energy than they arrived with. The 10 Doorways that follow provide approaches and activities to turning meetings into movement.

1.
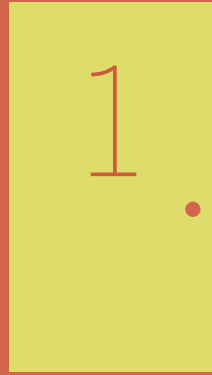
SPARK
CURIOSITY

Those gathered are bright-eyed with arms
uncrossed, responding to a sense of welcome and
hospitality. There is a look of expectancy about
what's going to further emerge in the room.

What makes some groups sing while others flail?

- Authentic full-hearted engagement.

- A shared currency of trust and respect.

- An individual and collective openness to see things new.

- A willingness to learn by doing and iterating.

We all know what real engagement feels like in a group. Yet we often plow into collective work without warming up our communitarian muscles. Your job as a facilitator is to help individuals bring their best selves to the table, shepherding the collective as they reflect, listen and adapt, making sense of the work at hand. This works best when everyone in the room shows up present and curious.

To think together effectively, we need to unlearn some of the ways we are used to operating in groups. Promoting efficiency needs to be balanced with giving participants agency and voice. Making time up front to notice the alignment and divergence of a group serves to build trust and respect—an essential ingredient for successfully addressing complex, multi-faceted issues.

> Making time up front to notice the alignment and divergence of a group serves to build trust and respect

The shift to convening groups for shared inquiry rather than solution execution is part of the philanthropic and nonprofit sector's shift to upstream, systemic solutions. We now describe change as emergence and recognize diversity as integral to the health of systems. This shift also invites greater attention on where we place group energy and attention: Where attention goes, energy flows. Where energy flows, life grows.

Socrates said, "Wonder is the beginning of wisdom." This spirt of exploration and discovery must be embodied by facilitators. If, before the first meeting, you as a convener have a preordained map of what the group should decide to do, you might consider whether gathering a group is even necessary. It is crucial pre-work to distinguish between issues that require the unearthing of new approaches—which diverse groups are great at—and those that instead require a more rigorous application of proven approaches.

Creating opportunities at the beginning for a group to identify both shared and divergent thinking helps map the common landscape and suggests starting places. Encouraging curiosity helps move group process from individuals advocating and jousting to common stewardship. For a group to be productive, its participants need to feel respected, seen and heard. This is not just simply about modelling civility. Your top job is to foster a healthy tone and identity in a group, creating the conditions for the collective that will propel innovation, invention and new synthesis.

TRY THIS

Check-ins and Check-outs

How many times have you been 15 minutes into a meeting when you realize you're still stuck in a previous conversation and haven't fully shown up for where you are now?

An initial check-in helps participants be present, connect with each other and engage. It can be as simple as inviting participants to share their "personal weather." Just knowing if people need coffee, had a sleepless night with a baby, or are in training for a marathon helps reveal what their co-conspirators are bringing to the table. It also allows you to read the initial temperature of the group and make real-time adjustments to the agenda. And by inviting everyone to have their voice heard at a meeting's start, it models equity.

Check-ins should happen again at the end of a gathering and, ideally, throughout. They are a quick way for the room to get a read on itself—to show emerging alignment and disagreements, allowing participants to compare their individual responses to those of the collected whole. For those whose perspectives or experiences differ from the majority, check-ins can provide an opportunity for their truths to be acknowledged by the rest of the group. This can help ease their resistance if the eventual collective direction does not end up reflecting their divergent perspectives. And it often allows participants with differing viewpoints to stand aside on specific issues in the spirit of letting the group move forward.

Check-ins are also energy boosters. Hearing different voices briefly shakes up the dynamic between chronic talkers and habitual listeners. Additionally, check-ins reinforce why we come together: to engage with differing perspectives. As a facilitator you will be amazed by the way initial themes foreshadow later discussions.

Here are some check-ins you may want to experiment with:

- Open a meeting with the opportunity for everyone to briefly speak about **what's giving them hope** about the issue at hand. This also models an assets-based approach, encouraging participants to build on existing strengths.

- Halfway through a meeting, invite each participant to **share one thing that's resonating with them so far**. This could be a question, an affirmation, a disagreement. This helps give a quick snapshot of where there's alignment developing as well as areas that could use more discussion.

- After a guest speaker or panel, ask group members to **offer a quick response**. It's helpful for speakers to hear the impact they're having (or not), and it reminds us all that we listen and absorb differently.

TRY THIS

Pause For a Moment

Making space for everyone to check in can be a high bar in professional and business settings that typically don't recognize *the need to go slow to go fast.*

In convenings, there is often perceived pressure not to devote time to developing relationships or allowing participants to clear and center themselves in the interest of being more present. In settings that involve government, such as public/private partnerships, going slow can run counter to the need to be seen as wise spenders of public funds. Meanwhile, in nonprofits, too much warmth can be seen as a sign of not being business-like. Ironically, it is in the business sector that engaging the whole person is increasingly accepted as a strategy for generating greater value.

If you're feeling brave, these two additional invitations can be game-changers:

- Suggest a **full-stop moment.** This is 30 seconds to a minute of silence that provides an opportunity for participants to take a breath and re-center themselves in the room. At the beginning of a meeting or after lunch, it can provide ending punctuation for whatever conversation each participant has just been having. This pause for quieting can also help remind participants of the group's ground rules.

- Invite participants to **set their intention.** This is a minute for those gathered to journal or think silently about how they want to show up for each other during the rest of the meeting. For example, they may dedicate themselves to listening more or voicing disagreement. These commitments are not for public sharing, but they will often appear in the meeting as participants become more explicitly mindful.

2.

SET THE TONE

Florescent lights blaring down or sun streaming through windows? A sofa with pillows, or folding chairs? Styrofoam cups or ceramic mugs? A participatory agenda or dictated schedule?

What are the signals of hospitality and welcome that help you show up as your best self?

- A personalized invitation for pre-meeting input.

- Individual welcome, and follow-up.

- An agenda with goals, clear roles and expectations.

- A setting and set-up that expresses care for those gathered.

- Everyone's voice is invited, heard and respected.

Hospitality and setting a welcoming table model the tone of caring and mutual support essential to groups generating powerhouse impact. To learn better together, we need to create an atmosphere that invites all participants to be fully present and ready to contribute and listen. Designing and holding gracious space invites everyone to identify and share skills and wisdom from their whole lived experience.

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Designing and hosting gatherings thoughtfully is the first step to sparking greater engagement. Imagine an all-day first meeting of a nascent collective action project focused on a corner of a county with high poverty and severe disproportionality. The 15 steering committee members have strong representation from residents, funders, relevant government agencies and service providers. But the meeting is held in a corporate boardroom. Participants must sign non-disclosure agreements at the front desk after providing photo ID. While the setting has its benefits—it's free and includes comfy chairs, a catering kitchen and ample parking, not to mention an entrée to further corporate support—it's hardly an inviting or familiar setting for all participants. How would the meeting go differently if instead it were hosted at a site within the area those gathered were intending to serve?

Successful facilitators consider the varying backgrounds participants bring into the room. One potential divider is who is getting paid to be here and who is not? Who has to use personal time off and lose income? For whom is this a paid workday? How might compensation affect the ability to participate and sense of status for participants? What can be done to acknowledge and mitigate this power differential? Inviting participants to consider and speak to the different compensations and costs for each of them in attending can be a powerful way to build trust and reveal context.

TRY THIS

What is the Welcome You Want to Extend?

As facilitators or convening hosts, we often don't explicitly reflect and name the welcome we want to create. A design team for a convening might start off by asking what they have observed in the past that encourages participants to show up as their best selves. What message, for example, might it send to greet and shake hands with everyone as they enter the room? How might it create a more inviting welcome if meeting hosts were to personally introduce themselves or touch base by telephone with each participant before the start of a meeting? What if you brought flowers from your garden for the table's center or a loaf of banana bread to share? Do any of these signs of person-to-person warmth seem unprofessional? If so, what does that reflect about your definition of professional convening behavior?

All too often, we let the enormity of creating welcome and access for all prevent us from prioritizing what matters most to a particular group. A simple exercise is to spend 10 minutes inviting participants to share obstacles they have in attending. This could be time of day, access to public transportation, location, too much presentation and not enough dialogue, etc. As a facilitator or meeting host, your job is to assess the level of comfort and trust in the room, and use that information to inform how you invite participants to share. Using "obstacles to attending," here are several variations of how you might structure and prompt group participation.

- The simplest approach for engaging group sharing is **going around sequentially in a circle**. One person begins. As a facilitator you can ask who is willing to go first or call on someone who looks ready. You then go around the room as people share or pass. A "no forced sharing rule" can be helpful, acknowledging that if you pass once you'll get a second chance to weigh in, while also being clear it is OK to pass a second and final time.

- Another approach is to have people **pair share, turning to a person next to them**. After two to four minutes of conversation in pairs, you can invite group members to share something lively from what they heard or said. Although some participants would always prefer to hear every conversation, inserting the occasional small group dialogue helps break up the monotony of always talking as a whole group. Working in pairs or trios also helps make sure there is more opportunity for participants to voice their thinking, and it can encourage greater engagement for those less comfortable speaking in larger groups.

- Another approach would be to **hand participants a prepopulated list** of "How and Where Matters"—conditions that affect participation and influence a sense of welcome—and ask those gathered to discuss and rank what's most important to them.

Location
- Neutral office space
- Conference room of a participant organization
- Someone's home
- Coffee shop or bar
- In the community served
- The funder's offices
- Outdoors at a picnic table
- By video conference

Access
- Weekday, weeknight or weekend
- Child care provided or stipended
- Accessible by public transportation
- Accessibility
  - For those needing accommodation
  - Language translation

Meeting Set Up
- Circle (campfire style)
- Rows (classroom style)
- Long single table (board room style)
- Chairs with no tables
- Standing meetings (which encourage brevity)

Meeting Collaterals/Signals of Welcome
- Name tags
- Food and beverage
- Materials and agenda
- Background music
- Flowers or table centerpieces
- Bowls of toys to fiddle with
- Clear, written goals for meeting
- Participant list to enable open follow-on

Consider Questions of Ownership and Sharing Future Leadership
- Who created or reviewed the agenda and meeting goals?
- Who sends the invitation?
- How is the invitation being issued?
  - evite, email, letter, phone call, face to face
- Is there a follow-up invite if invitee does not RSVP?
- Who can call additional meetings?
- Is rotating hosting an option? Who would be the natural partners to share the responsibility?

Determine What Happens After the Meeting
- Send a thank you note with a survey to gather feedback on the participants' experience.
- Notes and action steps from meeting
- Scheduling (or not) of follow-on meeting(s)

Agree on Some Signs of Convening Success
- Positive survey results
- People leave with more energy than they arrived
- People volunteer to help host/convene next session
- Participation was widely distributed
- Laughter happened
- People weren't lost in their devices
- Questions and comments were respectful and on point

TRY THIS

Conduct a Pre-Mortem

Sometimes when we feel stuck in planning, the counterintuitive approach of naming and working through imagined failures can shake loose some creative thinking. Do a pre-mortem exercise with the planning committee or with participants: "Imagine our convening failed. Why did it fail?" The answers should follow the structure "It failed because…" which almost automatically leads the mind to an answer—often the single most important answer—rather than a list of things that could go wrong. This exercise draws upon pattern recognition and experiences, helping to focus a gathering on what's most important to address.

Some favorite "must not dos" from past pre-mortems include:

- It failed because the conveners came with pre-drawn conclusions.

- It failed because we didn't allow time to build trust.

- It failed because we talked at people, not with them.

3.

BUILD TRUST

One person wonders why no one is challenging the thinking of another participant. Someone is starting a grocery list as the most vocal person in the group drones on—again. The co-chairs talk past each other on the same topic repeatedly. Nearly everyone wishes someone would have the courage to observe and express that the group has been stuck and swirling for an hour.

Groups move forward at the speed of trust. How do successful facilitators develop and sustain connections among group participants—especially connections imbued with empathy and understanding? Some proven tacks:

- Build patience while holding an urgency for change—"It takes the time it takes."

- Allow the room to develop a group culture and frame the right question(s)—tone and identity are the bedrock for building effective structure and action.

- Identify a shared vision of change—it will serve as the North Star when a group loses its way.

- Remember that equal duties don't automatically produce the best results—allow for different group roles according to interest and experience.

One of the hardest shifts in designing and hosting powerhouse convenings is the "old dog, new tricks" resistance many of us struggle with in changing up how we best learn and progress together. Often this is because activities designed to foster trust and alignment must focus on tone and identity—rather than the structure and action model many of us are more accustomed to during group work. We build trust by developing a shared context together, by telling stories and making sense together. Exercising these associative muscles means designing and allowing an experience to unfold in the room that is often diffuse and iterative.

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Themes and Patterns

Action

Structure

Tone

Identity
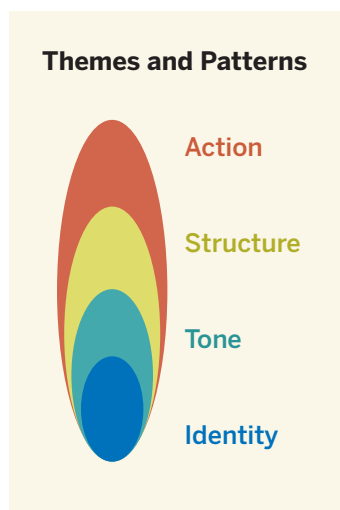
Source: Dialogos

A key goal here is helping groups listen so they notice and name key themes and patterns. These articulated themes and patterns then begin to define a shared map of the ecosystem.

Learning together is a key strategy for groups to build trust, alignment and openness to innovation. That can be hard when a convening often gathers professionals whose default is to lead with her or his expertise. The challenge—especially in groups new to each other, culturally diverse or representing many sectors—is forming a sense of trust so that participants see mistakes and incomplete ideas as sources of learning. One of the great joys of group work is moments where new evidence or insights appear, reminding us all "that we don't know what we don't know."

A common vision of change, explicitly held by a group, can do wonders in reducing squabbles over approaches or mitigating distrust from previous efforts. It also serves as a guide for ensuing rounds of learning and action testing. Often the first draft of a shared vision can be a rough diamond, which is then polished through rounds of testing and inquiry. After some initial rounds of learning, storytelling and sensemaking, it's often useful to have groups pause to summarize what has shifted or evolved.

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This type of occasional summary helps participants notice and celebrate the group's progress, which can tamp down impatience. Helpful summary elements include:

- What's known and can be affirmed.

- What's in play and needs further discussion and research.

- What's unknown or has conflicting theories in the group.

This can also help groups prioritize where to spend limited time, such as focusing energy and attention on moving "what's in play," rather than in restating what's known or bemoaning what's unknown.

TRY THIS

Use Third Objects to Create Shared Learning

Third Objects—such as readings, TED talk videos, poetry, field reports and white papers, personal testimony and expert panels—are tools for groups to build muscle for making sense together.

Sharing—and listening to—responses to a third object helps a group notice its thinking as a collective. It helps them practice pattern recognition—are there habitual ways particular members respond? Because the third object is usually new to all participants, discussing it offers equal footing to everyone, regardless of experience. Finally it also avoids the airless navel-gazing that sometimes results from a lack of new evidence or perspectives.

Ideas to spur your use of third objects include:

- Screen a five-minute video to prompt reflection and discussion. I first saw this personal favorite—**a rap about mental models**—in a Girl Scout staff retreat, where it lightened the mood profoundly.

- Use a poem to spark discussion about the spiritual dimensions of a group's purpose. A personal favorite is **"Shoulders" by Naomi Shihab Nye**.

- Read an essay that strongly represents a viewpoint. The **Center for Civic Reflection** is a tremendous resource of both source materials and discussion guides.

- An overview of the power of Third Objects is covered in the chapter "Let the Right Brain In" in another of The Giving Practice's DIY Guides, **Philanthropy's Reflective Practice**.

TRY THIS

Build a Shared Story

Groups don't usually start off with shared language or a common understanding of where they are in the work. They may even have differing mental models about the issue at hand or its contexts. Creating a shared story, with key previous chapters named and summarized in a timeline, helps a group become clearer about the part of the story they are currently developing together. It fosters common understanding about previous efforts, which often helps make explicit the vision of earlier eras. A shared history can also help address the objection that "We tried that before and it didn't work" by reminding the group that past attempts at solutions may play differently today. What information or evidence is available to us now that wasn't before?

One simple model for shared story building involves sorting the effort into key chapters that have led to and informed the current work. You can then flesh out each chapter.

- What would the chapter titles be?

- What were the hypotheses or beliefs that informed previous efforts?

- What were the key successes and lessons learned?

- What changed or is changing in the environment? This can be external (demographic shifts; changed policies; new technologies) or internal (a shift in organizational willingness to take a risk; a leadership team that now values collaboration).

Three questions can be helpful in prompting the group to share reflections on what's happened so far:

- What is important now for us to notice and remember?

- What is the title of the chapter or two that will follow our work?

- How are our current efforts working to contribute to an ongoing vision of change?

TRY THIS

See it New Through Metaphor

Metaphors can help a group articulate a shared identity. They're also useful for identifying where participants feel they are in a process, both individually and collectively. Noticing different experiences within a group helps create empathy. Those who are drivers by nature may become more accepting of the cadence of group work necessary to reflect differing personality styles.

Similarly, metaphor can remind those who crave process or information of how others in the group require a balance of concrete actions: iteration, concept testing and action learning. A simple but profound metaphoric question that can serve as a prompt for this reflection is "What season is our work together in?"

- Winter: consolidation and regrowth
- Spring: planting and winnowing
- Summer: watering and weeding
- Fall: harvesting and gleaning

Another frame is to ask what phase of the process we are in: discovery, sensemaking, testing, evaluating, re-invention? If we had to assign an age to our effort, would we be a toddler, teenager, adult or elder? Are we a minivan, pick-up truck or electric scooter?

4.

APPRECIATE DIFFERENCE

Are we having a conversation about hammering out a shared vision or a meeting about what we are going to do? Who is actually in charge of determining whether we've made a decision? How should a group balance personal viewpoints while also holding true to the organizations they represent?

Groups with real power and agency become comfortable working in dynamic and variable ways that leverage the differences in the room.

- Innovation usually requires some discomfort as new ideas make their way into the world.

- What feels like conflict initially is often a doorway to new and deeper understanding—but it requires us to maintain curiosity.

- Effectively leveraging the diversity in the room requires us to identify multiple roles, multiple owners and multiple assumptions.

- Paradox—two things being true and in oppositional tension—can be a tool to wayfinding a new synthesis. This can help us hold ambiguity and keep our desire for magic bullets at bay.

The more flattened, democratic and inclusive convenings are, the more magic they inspire. The magic is in the learning that can open new vistas to innovation, and it's nurtured by groups seeing with fresh eyes and multiple perspectives. In convenings with a high level of generativity and curiosity, participants feel comfortable wearing several hats and fulfilling shifting roles. For you as a facilitator, this might feel chaotic and risky to manage. Perceived power and status shrink as impediments when people listen deeply to each other's stories and analysis of the issue at hand. Group sensemaking builds shared purpose and trust by affirming both our commonalities and differences.

> The magic is in the learning that can open new vistas to innovation, and it's nurtured by groups seeing with fresh eyes and multiple perspectives.

Yet this spirit of convening can also lead to unintended consequences. With shared accountability, there can often be confusion about who has ownership and final say. Participants might feel torn between representing the multiple roles they play in a community while also honoring other allegiances. Diverse stakeholders often bring wildly different assumptions about process, ground rules and pace. We—both facilitators and groups—need to remember that it is precisely these discomforts and disruptions that can reveal and even unlock innovation.

Breakthroughs on intractable problems are rarely achieved by the practice of simply collecting and synthesizing what's known—"best practices." Instead, the aim of groups, especially initially, should be leaning into and welcoming the emerging vision of what wants to come to be— "next practices."

It's key that we become more comfortable naming and holding paradox and ambiguity as essential to systems thinking. The desire for a magic bullet solution often interferes with deep inquiry and

observing interrelated and often competing truths inherent in complex issues. Activities that reveal the continuum and range of a group's thinking are a strong starting point. Open-ended questions and opportunities to compare notes along the way help the group co-create a model that values continuous learning as the path forward. The urgency and magnitude of an issue frequently leads groups to shortchange curiosity and discovery, narrowing their shared inquiry too early in the process. Rather than a bullseye target, with its clear progression of better-to-best ideas, a constellation framework better supports group engagement in adaptive work.

TRY THIS

Map a Constellation of Your Destination

Creating a Learning Constellation framework as a map for common aspirations allows for, say, a half-dozen key points to have equal influence initially. What are the most important constraints or opportunities you are seeking to address? Creating initial sorts of areas that are either "in" or "out" of your scope can be useful. It encourages groups to notice what is included in their challenge and their interrelationships, and prevents meetings from becoming arguments about how perfect or not a proposed tactic is.

It's exciting when groups develop a new or more nuanced understanding of an issue based on seeing interrelationships differently after deep listening. The constellation approach keeps open the possibility for new combinations of key factors, which is helpful for ensuring a group doesn't close in too early on a particular solution or strategy.

A Learning Constellation approach is more aligned with adaptive rather than technical problems. As explained by Ron Heifetz (whose **TED talks on that distinction** make good third objects), technical problems can

Learning Constellation

Execution Bullseye

be solved by existing expertise, while adaptive problems require innovation and learning. Developing a vaccine is a technical problem (and likely not helped much by convenings). Distributing a vaccine and developing public will to use it is an adaptive issue that requires the perspectives and sensemaking that diverse groups offer.

Refer to the resource guide for links.

TRY THIS

Distinguish Between Conversation and Meeting

Groups often arrive expecting to launch into the most familiar meeting mode: driving to execute a pre-developed action plan with a clear destination. But effective adaptive work requires an appetite for learning, for "wandering in the wilderness together"—for conversation, as it were. How can we design and facilitate in ways that support this kind of generative group work? Partly by being clear up front that we are pursuing a process that initially encourages more inquiry and postpones arguments over tactics until alignment on various elements emerges.

The key is helping the group understand why the initial phases of a convening focus more on listening and mapping, and then helping them practice articulating and sharing mental models and contexts. One way to do this is discussing the differences between a traditional meeting framework and a conversation framework.

Meeting
Creation of action steps; interchanges flavored by need to influence results; persuasion, lobbying
- Focus on outputs ("how much?" and "by when?").
- Listening for which side is winning.

Conversation
Creation of shared meaning; exposure of alignment and difference; fueled by curiosity and inquiry
- Focus on outcomes ("who for?" and "so what?").
- Listening for what's emerging in the center of the room.

Focusing on assets can also help groups less accustomed to the process of discovery and learning together. Instead of searching for gaps and deficits, look instead for assets where an investment might boost capacity or an existing approach. The theory of "positive deviance" says breakthroughs may arise from identifying the outliers in a situation who are achieving better than average results. The next step is to discover what they are doing and why it works so well.

Some prompts to encourage reflections on conversation vs. meeting include:

- Reflect on a time when you were involved in an effort that had unintended consequences. What conversations or inquiry might have helped avert this?

- Have you ever designed a strategy or solution that focused on growing assets already in place, rather than identifying and remediating gaps?

- Show a video on the positive deviance approach. Invite members to share in pairs what they think characterizes those community members who seem to have most successfully surmounted the issue at hand.

"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

5.

SHARE PURPOSE

What are we all actually doing here anyway?
Are we all really needed? There are so many
people with so many different agendas.

To be sure, innovative group work involves some cul-de-sacs. There will be missed turns. So how do you best help groups remain connected to the beacon that is shared purpose?

- Make time to invite reflections on how participants' calling to the work at hand may be shifting.

- Provide opportunities to practice metacognition—reflecting on how we're thinking and learning together.

- Remember to acknowledge community voices that reflect lived experience, and ward against the clinical remove of theory and abstraction.

- Break up routine business by risking questions of real impact: "So what?" and "Who for?"

Effective group beginnings make time for participants to share the promise of change that brought them together. It's important to not treat this cursorily. Instead, we need to include opportunities for groups to articulate their shifting sense of calling as the work proceeds. This ensures that a shared sense of what has brought them together is always present. It also foregrounds the group's animating spirit, which can get lost in the sausage making of group process. When groups intermittently reflect on their highest purpose, it can also help ensure that low-return busyness isn't being confused for making real and lasting progress.

> When groups intermittently reflect on their highest purpose, it can also help ensure that low-return busyness isn't being confused for making real and lasting progress.

For some groups, it's easy to retreat into a bubble of theory and abstraction. Mission moments— where those most affected by the issue at hand ground truth in their experience—help ensure that meetings don't become removed from the front lines of community work. Groups and collaborations can learn more about one another through shared hosting—rotating meetings among their offices and work sites. New and varied surroundings often evoke curiosity and fresh eyes.

Practicing metacognition—thinking about thinking—can also help groups reflect on where their true leverage lies. One funder collaborative practiced such a reflection—"Who for?" "So what?" —at the beginning of a scheduled half-day of reviewing proposals. In ten minutes, we agreed the current set of proposals, and thus our approach, was deeply unsatisfying and far from our mission. The consensus was that the current strategy had led us away from our shared goal of promoting significant system change. That said, all the proposals under consideration were worthy and vetted by collaborative members. So the group decided to award each of them a small sum to acknowledge our support of their work. Then we spent the rest of the time discussing how system-innovation interventions might look different, and designing a different process for how to solicit proposals to bring it about.

TRY THIS

Identify Passion Points

Invite participants to share something related to the group's work that feels full of energy to them. This could be an event, a relationship, a realization, a moment, a reading. Have the rest of the group listen for individual and organizational values inherent in the stories. After everyone has shared, have the group identify common themes. Sharing passion points helps groups get a better sense of where its energies lie, and also serves to celebrate progress made, even while other areas of your shared purpose may feel murky or emergent.

At one multi-day convening of three generations in a family foundation, we started with an atmosphere of distrust and a shared doubt of there being any common ground. Participants began by speaking to one thing in the past year that had meaning for them. After an opening round of reflection, there was a perceptible lightening of the mood, as the moments shared revealed both passions and a common desire for a better world. Then one distant cousin noticed a common theme: almost every story involved dirt. Community gardens, forest preservation, and bike and hiking trails all shared this common thread. From then on the day was one long lean-in moment, with differing generations relaxing and digging (so to speak) into this common concern.

TRY THIS

Share Journey Stories

Make time within a longer meeting, or over several meetings, for group members to share stories of their personal journeys, especially those experiences that inspired or influenced their commitment. The invitation question can be as simple as "What are one or two moments in your journey that have brought you to this table today?" In addition to encouraging participants to show up in three dimensions for each other, this storytelling can reveal resources and alignments. In one rural funding collaborative, the eleven participants had been meeting for a year to create an aligned effort against intergenerational poverty and had articulated a concern that residents living in poverty weren't represented at the planning table. Sharing journey stories, seven out of the eleven spoke to their lived experience growing up in poverty or experiencing poverty as an adult. The energy of the group shifted. Participants became more confident they were working "with" and "as" the affected population, rather than doing something "to" it.

TRY THIS

Put It Out There In Pictures

Images speak differently than words, especially when we are trying to evoke a shared vision of change. Invite participants to be on the lookout for images that reflect the change they want to see and have them bring them to the next meeting. The images can be from a newspaper or magazine, a photograph, a piece of art, a found object. (Because not everyone will remember to bring an image, you as a facilitator can bring magazines to find images in or paper to draw an image on.) At the meeting, have each person place their image on a table or in the center of the gathering, sharing with the group some of the reasons it resonates. After all the images are assembled, invite participants to cluster them by themes, or to identify common or discordant elements. Push it farther by creating a mood board of all the images and sharing copies with members.

6.

TRY, TEST AND LEARN

Why is this group so intent on action when what we need is more discovery and sensemaking? Why is this group so enamored with discovery and sensemaking when we need to be prototyping and iterating actions?

Pioneering new approaches requires a group to both iterate and reflect, often in the same meeting. We can do this by:

- Developing an appreciation for how action and reflection fuel each other. This will increase participants' tolerance for time spent in both.

- Playfully heightening the stakes can prevent groups from becoming overly earnest and help them remember that making mistakes is part of getting to new frontiers.

- Pushing beyond our comfort zone often feels bad in the moment—and often leads to breakthrough thinking.

- Tempering our urge for action and conclusions. Yes, "everything's a mess in the middle." But what can feel like wandering may be the gestation of new models.

Nothing makes people retreat into their home camps more than the stress of being in the middle of a process and worrying that the whole shebang might be heading south. You can help participants recognize their personal preferences for action or inquiry. That will help grow the group muscle for successive rounds of action and reflection. This rinse-and-repeat of try, test and learn builds both group momentum and fluency.

In the classic children's book, The Carrot Seed, a young boy hopefully plants a seed in the ground. His friends and family doubt anything will actually grow and keep encouraging him to dig it up to check its progress. The boy, sensibly, resists these skeptics and holds fast, emerging at the end with a carrot that fills a wheelbarrow and quiets his critics.

How do we constrain the urge to keep pulling up the growing carrot of our work to check its progress? Especially when we need to collect some data and story to maintain the group's trust in our current direction and process? As any group builds trust, participants might voice uncertainty about where the work is headed. That's common, and it's reasonable. As Margaret Wheatley reminds, "Everything's a mess in the middle. Change occurs in cycles: one step forward, two steps back, two steps forward, one step back." How do we reframe the messy middle of any group process, replacing a desire for quick results with curiosity and the radical patience successful systems change demands?

> How do we reframe the messy middle of any group process, replacing a desire for quick results with curiosity and the radical patience successful systems change demands?

Chunking the potential work ahead often helps. You can clarify the sequence of upcoming action and create transparent timelines for next steps. Participants usually appreciate being allowed to group themselves into areas of interest. For convenings that are likely to extend beyond an initial gathering, one strategy is to propose a "try-it-out" period of three-five meetings, with the promise that the group can stop then if there isn't energy or interest in continuing. For a one-off gathering, a closing section might include an invitation to share "offers and requests" to prompt next steps.

Groups gathering longer-term should schedule an hour every six months to assess and check-in on both progress and culture. It's a chance to ask, "Are we progressing toward the impact we committed to?" (the why of the work) and "Are we feeling positive about how we are working together and the culture we're operating in?" (the how of the work). Groups derail from both ends —achieving goals is not enough to ameliorate participants feeling miserable about how the group functions; similarly, feeling good about the group cannot make up for a lack of progress toward impact.

It may also help to educate participants about personal differences in approach that are present in any group. Appreciating different learning styles is crucial to holding space for generation and iteration of new ideas, especially the wild hare notions that are often markers of seeing things in a truly new fashion. Another key is shared understanding and acceptance that some in the group would like to move to decision and action sooner, while others would be happy to consider options endlessly. Developing a tolerance and affection for group members different from you is essential to success. I have often described group success as a Slinky. The Slinky combines the arrow, which suggests (forward and linear) action, and the spiral, which suggests (lateral and spacious) generativity.

ARROW
(forward & linear)

SPIRAL
(lateral & spacious)

SLINKY

TRY THIS

Stand and Sort

Group sorting exercises are a great tool for getting people into their bodies and on their feet. Ask participants to arrange themselves in a line with those who want more reflection on one end, and those who favor action testing on the other. Participants will almost always need to do some quick peer check-ins as they find their places on the line. When folks settle into their spots, one follow-on is to have people cluster with those nearest to them into small discussion groups. Questions might then include "What do you want others to understand about your perspective on the reflection-action continuum?" Or you might have the groups share stories about an experience that helped forge their current preference.

It's also important to acknowledge the "groan zone." There is almost always a period where a group is eager to come to some decision but also recognizes that more inquiry will be helpful before closing on a particular strategy. The magnetic tug of coming to a decision is powerful. In order to be sure the group decision point reflects sufficient inquiry and sensemaking, it can be helpful to coach the group through a learning-by-doing approach. Iteration, rapid prototyping and "little experiments" are great ways to test and learn in pursuit of pressure-testing emerging conclusions.

Divergent Thinking

Convergent Thinking

Groan Zone

NEW
TOPIC

DECISION
POINT

FAMILIAR
OPINIONS

DIVERSE
PERSPECTIVES

TIME
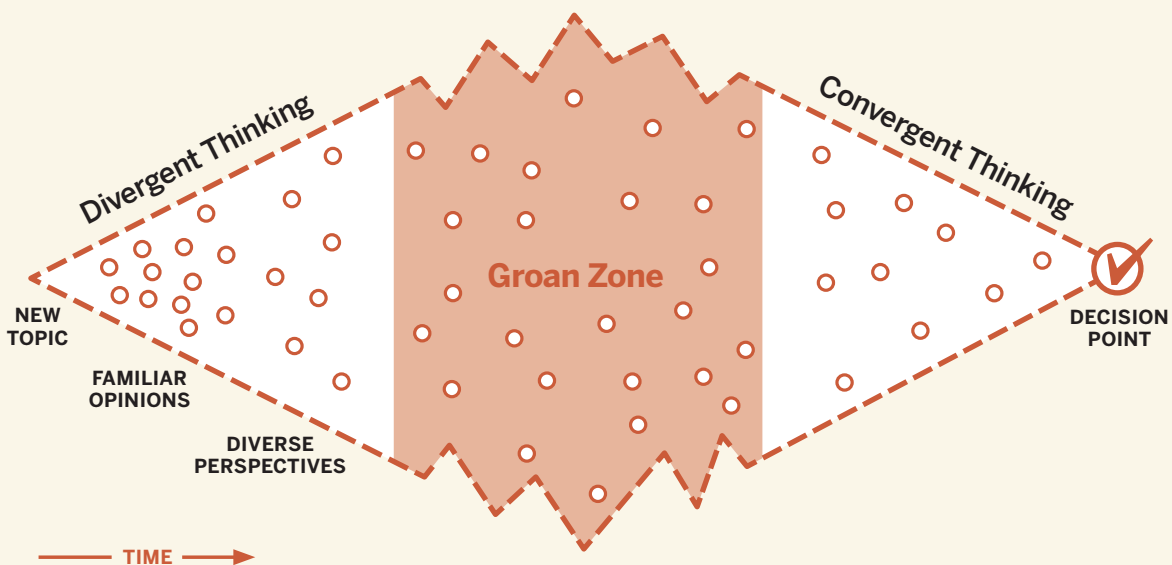
TRY THIS

Envision Utter Failure

TRIZ is the name of a technique from the Russian aerospace industry that asks us to envision how we can make sure our efforts do *not* succeed. The power of this approach lies in its humor and absurdity—it engages the group in imagining the worst, which inevitably leads to unexpected insights as people let their guard down in moments of playfulness. It ends by focusing on what we need to "stop doing," which creates space for the new. This is especially useful in the nonprofit and philanthropic sectors, which often avoid the rigorous discipline of cutting bait when things aren't working.

Steps and Schedule

1.
First alone, then in your small group, compile a list of to-dos in answer to:

How can I/we reliably create _____ ? *[a very unwanted result of your work together]*

• 10 minutes.

• Go wild!

2.
First alone, then in your group, go down your list and ask:

Is there anything we are doing that resembles in any shape or form the to-dos on our list?

• Make a second list of those activities & talk about their impact.

• Be unforgiving.

• 10 minutes.

3.
First alone, then in your group, compile the list of what needs to be stopped.

• Take one item at a time and ask:

How am I and how are we going to stop it? What is your first move?

• Be as concrete as you can.

• Identify who else is needed to stop the activity.

• 10 minutes.

Source: http://www.liberatingstructures.com/6-making-space-with-triz/

7.

EMBRACE OBSTACLES

People start showing up late or not at all.
Eye rolls or furrowed brows are common. There's
backsliding into conflicts the group had previously
seemed to move beyond. The hallway chatter
and after-meeting phone calls now seem to have
more energy than what folks are willing to put
on the table in the meeting.

Effectively facing the obstacles inherent in any group process requires facilitator jujitsu —you need to harness and repurpose the energy and momentum of the resistance. Here are some successful techniques:

- Fearlessly naming what's contributing to an impasse often reveals obstacles in a new way that invites a shift in approach.

- Helping participants recognize their individual strengths and weaknesses in promoting courageous conversations can help the group support each other's personal learning and growth.

- Use the "Three Whats" technique to help groups make sure everyone has heard the same thing before making inferences and proposing action.

Stuck places often mark an evolution in a group's progress—an adjustment sparked by new evidence or learning. It's human nature for individuals to become rigid as they sense truths they once thought secure morphing into something else. Rather than ignoring these often-uncomfortable moments, we can treat them as learning opportunities. They're chances for the group to uncover and examine the factors that have caused it to momentarily dig its heels in. Embracing the current bottleneck empowers the group by modeling determination and resolve —because the only way out is through. And this struggle for deeper analysis and nuance builds the group's deliberative capacity.

 "How has your understanding of our work shifted or changed?" is a question that encourages a group to do a reflective check-in to be sure they are all still working within a shared frame. It can also be a powerful tool for you to help the group notice how the group story or narrative has shifted. Hammering out a revised version of the group's purpose and work can invigorate the collective's sense of itself, as well as highlight areas

> Hammering out a revised version of the group's purpose and work can invigorate the collective's sense of itself.

that may need additional inquiry, attention or reassessment. Keeping participants on the same page, or at least within the same chapter, may seem like extra process work that doesn't offer much return, but it is essential to successful group work. Impatience with keeping groups coherent and whole is why so many collaborations or convenings start off full of energy but ultimately aren't sustainable.
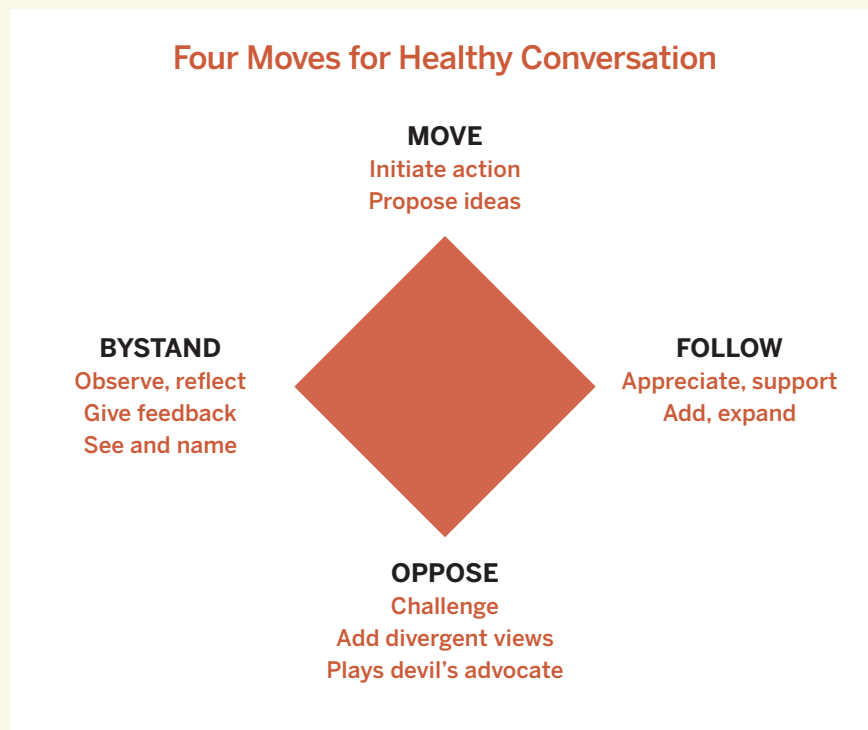
TRY THIS

Acknowledge Key Roles for Courageous Conversations

Groups comfortable with different interpersonal dynamics can grow their muscle for courageous conversations. The Four Moves system recognizes essential roles needed in any effective conversation or group effort. While it is common for individuals to habitually play one or two of the four roles in groups, anyone is able to channel the energy and intention of each of the four roles.

Assign each of the Move concepts to a place in the room. Have participants go to the corner that reflects the role they most naturally play.

Have them gather with others in one of the corners and then share reflections and observations about why they picked this corner as their dominant or preferred style for group interaction. Then have participants move to a role they are looking to develop, again offering an opportunity for participants to caucus and share reflections. Participants are reminded that everyone is a work in progress, a mix of strengths and weaknesses, and this empathy and vulnerability can help groups slog through difficult patches more compassionately.

Four Moves for Healthy Conversation

MOVE
Initiate action
Propose ideas

BYSTAND
Observe, reflect
Give feedback
See and name

FOLLOW
Appreciate, support
Add, expand

OPPOSE
Challenge
Add divergent views
Plays devil's advocate

Source: William N. Isaacs; Dialogic Leadership

TRY THIS

Clarify with the "Three Whats"

**Use the "Three Whats" to make sure groups are basing their sensemaking and proposed action on the same evidence.** You can often make headway on bottlenecks and impasses by taking one step back, and making sure you are all in agreement on what you've heard or observed.

1. **What:** What did you hear or observe?

2. **So What:** What sense do you make of it?

3. **Now What:** What actions or inquiry does it suggest?

It can be powerful to hold "Three Whats" debriefs in pairs or small groups. This allows for each group to report in on their conversation as one piece of the full picture. As the whole group observes the report backs, alignments and divergences surface. You can also add a fourth "What" to the exercise—"What didn't you hear?" This can encourage the group to articulate familiar scripts they may have been expecting. Or it can help the group discern absences that are more problematic—the perspectives of those impacted, absent voices, metrics, crossover approaches from other disciplines and more.

Making the time for participants to each share their perspectives is real-time DEI (Diversity, Equity and Inclusion). It creates an opportunity for new synthesis in the inevitable revelation that participants see things differently. It also gives groups permission to invite leadership from the side. By listening and examining perspectives that don't represent the majority view, groups can get a real time sense of competing theories of action that proceed from the same set of facts.

8.
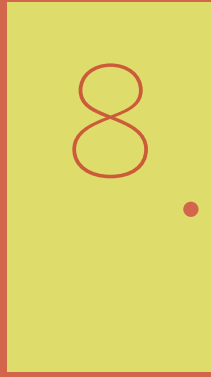
DISTRIBUTE POWER

Do other people really see it that differently?
Maybe I'm just not meant for group work—
I feel like I'm from some other universe in many
of our conversations. How can I voice my
disagreements without seeming like I'm not
a team player?

Powerhouse convenings help groups appreciate each other's foibles and frailties, allowing each of us the grace to show up as our full selves. We're all learners, with both blind spots and insight. Some observations:

- Messiness and ambiguity may ultimately make for greater impact than smooth sailing. Groups need to build their resilience for working with seemingly intractable issues.

- Efficiency may not be the best route for the deep work, with participants fully present, that surfacing new approaches requires.

- Inviting leadership from the side can create unexpected openings—and it underlines the value of lived experience from many perspectives and backgrounds.
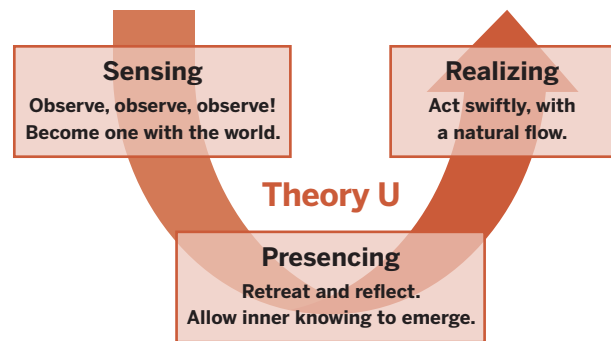
Many of us have been involved in groups that promise all the right ingredients, but never seem to come together. Often this is because the pace and structure of the convening does not spark the full aliveness of its participants. Rule number one here is to recognize that flourishing systems—from the environment to economies—are heterogeneous. In nature, there's rain, there's sun, there's wind, there's cold—all in sometimes unpredictable patterns and proportions. The result is that individuals develop resilience by having their needs both addressed and tested. Generative group work needs a certain messiness and ambiguity to unleash the energy and ideas that spark new approaches and innovation.

> Generative group work needs a certain messiness and ambiguity to unleash the energy and ideas that spark new approaches and innovation.

The best thinking on community leadership ties better impact to deeper discovery and integration across systems. John McKnight began this movement by encouraging a focus on growing community assets rather than identifying and filling gaps. Peter Senge added to the field by advocating that groups purposefully become learning organizations. Where funders used to ground solutions in white papers and theory, there is now consensus that a group sensemaking process can uncover new leverage points by including wisdom from lived experience.

Otto Sharmer's Theory U models three movements for group sensemaking: dropping down, letting come and trying stuff. The initial two movements emphasize the co-sensing that allows group members to step outside their personal/organizational bubble to see multiple dimensions of the issue at hand. This might seem inefficient to those who think the shortest distance is always the most effective path. In the U diagram, the shortest distance would be jumping from the left

tip of the U to the right tip—from sensing to realizing—without taking the critical time in between for reflection (what Scharmer and others call "Presencing"). This straight-line approach tries to solve a problem without engaging our understanding of it, our curiosity about it, or diverse perspectives on it.

Sensing
Observe, observe, observe!
Become one with the world.

Realizing
Act swiftly, with
a natural flow.

Theory U

Presencing
Retreat and reflect.
Allow inner knowing to emerge.

TRY THIS

Catalyze Loose Connections

Taking time to surface loose connections acknowledges all groups have blind spots and unconscious biases. We don't know what we don't know; we don't see what we don't notice. Innovation often occurs on the boundaries and in the intersections between disparate disciplines. This prescription to wonder and wander can conflict with the instinct to design tight meeting agendas that drive to measurable outcomes. All of which is like a recipe for leavened bread without yeast: it can't rise. We need to make room for serendipity, a space for seemingly unrelated practices and mental models to come in contact and catalyze new understanding and openings.

Try opening your gatherings with a round of speed-dating conversations focused on a generative open-ended question or prompt. "What has come clear since we last met?" was Emerson's inquiry when he met neighbors on his morning walks through Concord.

Margaret Wheatley suggests opening with an appreciative inquiry: "What is giving you hope in our shared work?" My colleague Audrey Haberman often uses the question we all long to be asked: "What is one thing people don't understand about your work?"

Here is one adaptation of an impromptu networking exercise:

Pick a prompt or open–ended question like "What is Giving You Hope?"

- Each participant shares with three different partners, one-on-one, over 15 minutes.

  - Remind participants of the value in picking partners you don't know well.
  - Five minutes split equally for each pair.
  - Share highlights from these three rounds with the full group.
  - Invite reflections on what participants noticed from telling their own stories.

TRY THIS

Invite Leadership from the Side

The best way to engage leadership from all quarters is to consistently use small groups to interrupt the council-of-the-whole design of most convenings. Always working as a full group reinforces standard meeting behavior, rather than sparking the curiosity of conversation and inquiry. Clustering in pairs or trios, or solo journaling and reflection, helps create trust as people give voice to their thinking. Break-out groups can deepen relationships. They can be empowering to introverts. They can also spread leadership away from those who may be perceived as having too much influence or power.

FOMO—fear of missing out—is often cited as the reason people resist breaking into smaller groups. There is also anxiety from those who like to control group dynamics by monitoring and redirecting the conversation. Small group work is especially important in convenings of 30 or more. Quick opportunities after keynotes for small groups to process and carry on what they've heard can make a real difference in participants' felt sense of engagement.

Pair Share. This is a go-to technique for turbocharging conversations. When you observe a "lean-in moment," or when you see a topic that makes everyone want to weigh in, have people turn to their neighbors and discuss it. You can also use this when there are "lean-out moments"—periods where the meeting energy or engagement seems low. Here you might ask folks to share "why what's being discussed is important to them." An even bolder approach: "The group energy seems low—what is this discussion missing that might engage more of us?"

Dialogue walks. Have participants pair up and spend 20-30 minutes walking outside the meeting room. For deeper reflections, suggest each partner speak for 10 minutes without interruption. This can also help break up the rhythm of the day and keep the group energized. Getting people moving and connected to the outdoors is a welcome disruption that can help shift florescent-light thinking and meeting mumbo jumbo.

Offers & Requests. Encourage individuals to name both what they are willing to commit to as well as any help or support they might need. Often, we talk at a high level of abstraction about what would be "good to do" without actually considering if anyone in the group is willing or eager to do it. This can also help reveal more about each individual's needs and fears, as well as where they are looking to engage.

9.

WELCOME COMPLEXITY

When will this group stop wandering in the wilderness and get it figured out? How am I supposed to explain to my colleagues why this gathering is a justifiable investment? What is it we're supposed to be doing here anyway?

Groups build their own sustainability by understanding that engaging in conversation and taking time to learn are actions. This acknowledgement fuels momentum and stamina to achieve greater impact. Here are lessons we've learned:

- Inquiring, especially inquiring that may disrupt or discomfort some in the group, can reveal the changing landscape of an issue.

- Working in networks requires paying attention to patterns and paradox as portholes to new ways of seeing.

- Playing more invites interruption that can flush out unexpected learning.

- Working collectively challenges orthodoxies of traditional models of leadership.

The downsides of group process can make anyone feel that working collaboratively is a fool's errand. It's time-consuming, can feel inefficient, and is full of personalities to manage and wrangle. A key solution here is to not shy away from explicitly reflecting on both the highs and lows. By candidly assessing and naming our progress and obstacles, we construct a working definition of group purpose that helps sustain collective inquiry and action. We need to remember that we are developing sea legs for these new-fangled adventures in collaborative action.

Convening with less hierarchy and more diversity runs counter to a lot of existing cultural and sector assumptions. Working in networks to support greater engagement is part of a shift in how we organize ourselves that's being pioneered in the business sector. In 2017, Harvard Business Review noted that for employees, "high engagement —defined largely as having a strong connection with one's work and colleagues, feeling like a contributor, and enjoying an ample chance to learn—consistently leads to positive outcomes for both individuals and organizations."

> By candidly assessing and naming our progress and obstacles, we construct a working definition of group purpose that helps sustain collective inquiry and action.

Leading thinkers on philanthropy echo this approach. "Strategic Philanthropy for a Complex World" addresses this shift. A "traditional strategy" of "Plan → Check → Act" needs to be supplemented with the practices of "Probe → Sense → Adapt." This "emergent strategy" approach is especially needed when addressing complex, adaptive issues and systems.

Complex systems are:	Addressing complex problems requires:
- Nonlinear	- Pattern recognition
- Unpredictable	- Working with paradoxes
- Uncontrollable	- Acting & learning at the same time
- Highly connected and interdependent	- Dynamic, counter-intuitive approaches
- Emergent (more than the sum of their parts)	- Unique, evolving solutions

Source: Strategic Philanthropy for a Complex World–SSIR & FSG

In their essential differences, groups offer both the promise of new thinking and broader critique. Wandering in the wilderness describes how groups build trust and create the path forward through learning together. For many of us, this co-creation is an underdeveloped skill for civic engagement. Philanthropy and nonprofit culture often mimic our culture's emphasis on annual returns over long-term value creation. One-year project grants encourage near-term outputs and reinforce the magical thinking that quick fixes will somehow transform into silver bullets.

We don't yet have adequate language, practices or metrics for longer-term investments and collaboratives. But new evaluation approaches, such as developmental evaluation can balance out our current over-reliance on summative metrics. Asking "What's changing?" in addition to "What's changed?" can help groups hold true to their shared vision through choppy waters that threaten to sink any bold ideas.

What can you do to help participants hold fast and remain open? You should first be aware of the body language and tone of participants. What you want are lean-in moments, conversations in which everyone is magnetically engaged. This is when new insights and synthesis are born, and the group senses its own power and agency. If you are the facilitator you can too often be distracted from the real action emerging by worries such as watching the clock (worry about time); watching the outliers (worry about conflict); or watching the contrarians (worry about agenda derailment). Or, most dangerous to any group's iterative wayfinding, a facilitator may have a predetermined idea of where the group should land, and may have even designed a gathering to herd them there. Chaos, messiness and challenges that disrupt our view of how things work are the fuel of power-house groups. The team's trust in its own ability to make sense together and hold true to its intention will allow it to collectively brave waters potentially too intimidating for any individual.

TRY THIS

Inquire Through Discomfort

Have the group identify questions that can deepen shared inquiry and elicit new synthesis. You can then encourage a test period to encourage those in the group to practice these new conversational jujitsu moves.

In the Four Levels of Conversation framework, Otto Scharmer and Adam Kahane build upon the idea from evolutionary biologist Humberto Maturana that conversations create the world. They outline a progression among four levels of conversation:

1. 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 sensemaking.

The key hurdle is moving a conversation from Debate/Clash to Inquiry/Curiosity. Often, when we are in the midst of Debate/Clash, we long to return to the status quo and politeness of Talking Nice. Instead, we are often better served by remembering that innovation and new clarity come from the inquiry and curiosity that characterize Reflexive Dialogue conversations. This is where we hear "That's so interesting, tell me more," rather than "You're wrong, here's why."

Groups that reach Inquiry/Curiosity in a conversation often uncover new insight and create synthesis. Innovation shows up when we work in new ways to join disparate elements. This is the generative dialogue, co-creation from co-sensing, that groups most relish. The last level of Generative Dialogue, which we can also think of as collective creativity, is where we speak from what is moving through us. The new alignment that lies beyond initial disagreement is the reward for courageous dialogue.

Part of being an effective facilitator is noticing and surfacing elephant-in-the-room questions. You can effectively present uncomfortable issues and critiques by introducing them as evidence to prompt and/or challenge the group's collective sensemaking.

Generative Dialogue (Co-creation)	Reflexive Dialogue (Inquiry-Curiosity)
Talking Nice (Softening)	Talking Tough (Debate/Clash)

TRY THIS

Play More, Pontificate Less!

Serious play calls us to shared work in new ways. Improvisation can help lower inhibitions and internal censors. Drawing, sculpting with clay or creating a structure with pipe cleaners often allows others to get beyond clever words to a new insight. Group play exercises can reveal participant styles and approaches, and surface useful distinctions in how people approach collaboration. Here are some different playful exercises you might try:

- The **Great Marshmallow Challenge** has small groups try to construct the tallest tower using only spaghetti, masking tape, one yard of string and a marshmallow.

- Having a group envision and **construct a tableau of a preferred future**, using dime-store props and construction paper is an approach that builds on human-centered design. Drawing a vision together can be equally generative and revealing.

- Experiment with having small groups create a skit or some other type of presentation (a top 10 list, for example) of an abstract concept, and then present it back to the whole group. It's a useful way to make strategy come alive.

- **Social Presencing Theater** is a technique where we work to express our hopes and stuck places using movement and striking postures.

- A collection of percussion instruments and a campfire can reveal much about a group's cadence and its ability to follow the leads of different drummers (and it's an excuse for the inspirational messiness of s'mores!).

Any of these exercises will elicit objections from at least some of the group. But isn't bringing new dimensions of ourselves and others to the work worthy of the risk of looking momentarily foolish or experiencing vulnerability?

Refer to the resource guide for links.

10.

MAKE IT YOUR OWN

I'm not sure I could ask a group to try an exercise that's so off-the-wall. Do I really want participants to show up as their full selves and be curious beyond the boundaries of their professional expertise? What do I do if we get to a place where I'm not sure what we should do next?

Your primary role in supporting powerhouse convenings is creating and maintaining a container for the group dynamic that supports trust and agency for all participants. Here are some things to keep in mind:

- Celebration of completed stages in a group's journey contributes to group cohesion and sustainability.

- Best-in-class facilitation is about making the "Try This" recipes included here your own.

- Spaciousness, breathing room and less structured time create openings for sensing and articulating what wants to come to be.

- Consider adopting increased "aliveness"—a sense of shared agency, wonder and movement —as a shorthand metric of group efficacy.

There is a missing frame for how we consider success in group work—the felt sense our work together engenders. Enlivening a group's sense of purpose and helping them sense clearly their individual and collective capacity is an investment in civic participation and community leadership.

A felt sense of purpose serves as fuel for moving ahead together, integrating the ideas from learnings and conversations. This is similar to the "flow state" described in modern psychology— enough challenge and meaning to fully engage curiosity and resolve, but not more challenge than the group is capable of handling, lest we feel overwhelmed and dispirited.

Sometimes we measure success in collective action by the speed with which we make it through a process. Consider instead how participants' capacity for co-design and co-sensing has grown. Solving complex, adaptive issues requires the discipline of building a healthy fire—too much wood piled on too quickly can dampen a blaze as surely as a pail of water. Our passion and commitment to create change can get in the way of the radical patience and openness required for making progress on intractable issues. We need to preserve some breathing room in our work if we are to elicit breakthrough approaches. What would it mean for us to shift our notion of working in groups from "It takes too much time" to "It takes the time it takes."

> We need to preserve some breathing room in our work if we are to elicit breakthrough approaches.

The toolbox in this guide for evoking shared agency focuses on assets and learning rather than gaps and remediation. Celebration is part of that. It helps groups articulate how and why they reached a goal, as well as what they might try differently next time. Asset-based approaches, like appreciative inquiry and positive deviance center on discovering where things are going well and

building from there. Being present for and listening to a group's preferred path forward is more valuable than any content expertise a facilitator may bring to the table. The rhetorical question —"Would you rather be right or happy?"—seems apropos here. Which best serves a group after their meetings are concluded: a "right" strategic plan or a "happy" sense of shared purpose, agency and openness to learning that may inform next efforts?

TRY THIS

Find Your Own Doorway

The crucial variable this guide can't address is *your* personality style: the tone and identity that characterize how you show up in service to a group.

To find your most effective voice and style in supporting powerhouse engagement, make time to reflect on your biases and feelings regularly. How do you really feel about the distinction between adaptive and technical work, conversations and meetings? Do you really think groups can come up with new solutions through dialogue and learning together? Do you doubt the efficacy of having groups "wander in the wilderness" using their shared antenna to find a new way forward? One effective resource for this personal discernment is my colleague Jan Jaffe's seminal guide *Philanthropy's Reflective Practice*.

Openness and vulnerability also reinforce that the best facilitators for collective action don't know in advance the path a group needs to follow or its final destination. A facilitator is something of a sherpa. While you may have

hiked these trails before, every group has its own unique way of moving forward, and you need to be in service to that unique way. That means being vigilant for bad weather or obstacles you may have encountered on previous journeys. But perhaps paramount is that you need to be able to maintain an internal capacity to see the trail anew, attending to where it's opening, or when you become momentarily flummoxed, asking the group for help in planning the next steps forward.

Implicit in all this is how working effectively within groups challenges long-held notions of credit and status. Successful collaborative leadership and collective action muddies lines of attribution and contribution. Working more collectively can also mean internal, individual shifts. You may find yourself listening more deeply and paying attention to difference. You feel more shoulder-to-shoulder connection and community. You may find the work of supporting groups to be less draining as your sense of your own role, effectiveness and accountability grow.

All this is captured in a single evaluation question for any convening or gathering: "Are the participants leaving with more energy than they arrived?" Consider adopting increased aliveness as a shorthand metric of group efficacy: a sense of shared agency, wonder and movement.

Some proven strategies for your work ahead:

Co-present and work in teams. Nothing is better than sharing facilitation and hosting by working with trusted colleagues. While one is in front of the room, the other can observe group dynamics and offer clarity or prompts. You have a buddy to assess agenda shifts in real time. And you have a debrief partner to help frame lessons learned and clarify next steps.

Become a student of personality styles, with special attention to how those with temperaments similar to yours typically express themselves at their best and worst. These can serve as real-time cues for how you might adjust to better serve what's showing up in the moment in the room.

Ask for help. Modeling vulnerability with a group encourages others to be bolder. When you step in it or feel yourself losing the thread, take the risk to name the moment you are experiencing and invite support from the group. Simple statements like "I'm feeling a bit confused … can anyone help me out by offering their take on what we're talking about" is an honest, open invitation that reminds the group we're all in it together.

Enlist the support of colleagues. Monthly debrief sessions with trusted colleagues can encourage you to address stuck places in your facilitation practice and share new approaches. Reading the blogs of thought leaders in the art of convening (see the resource guide for some starter suggestions) can spur your own personal sensemaking and continue to build your tool box of techniques.

Embrace imperfection. The greatest enemy in supporting powerhouse engagement for any group is our own fear of not delivering the goods. Often a group's success or failure has little to do with you as a facilitator or convening designer. You are there to help divine and open doorways to collaborative action. Driving participants through an opening is not your job and can lead to unintended consequences. If you feel frustration with a group's pace or gumption, the most powerful thing you can do is to candidly offer up your experience as a source for explicit reflection by the group.

Don't forget fun. Having a good time is an underrated element of group agency and sustainability. Insight and innovation often come when we suspend our habitual ways of seeing. Professional earnestness sometimes seems to cause groups to become enamored with the problem at hand rather than showing up as co-conspirators for change. As Rick Ingrasci puts it, "If you want to create a new culture, throw a better party."

RESOURCE GUIDE

References

1. Philanthropy's Reflective Practices	http://www.reflectivepractices.org/
2. Ron Heifetz	https://www.youtube.com/watch?v=MYafOEtvLnI
3. Social Presencing Theater	https://www.presencing.org/aboutus/spt

Additional Resources

Appreciative Inquiry	https://appreciativeinquiry.champlain.edu
Art of Hosting	https://www.artofhosting.org
Center for Civic Reflection	http://civicreflection.org
Center for Courage & Renewal	https://www.couragerenewal.org
Chris Corrigan Facilitation Resources	http://www.chriscorrigan.com/parkinglot/facilitation-resources/
Future Search	http://www.futuresearch.net/
Graphic Facilitation	http://www.grove.com
Gracious Space	http://www.ethicalleadership.org/gracious-space-toolkit.html
Learning as Leadership	http://learnaslead.com/
Liberating Structures	http://www.liberatingstructures.com
National Coalition for Dialogue & Deliberation	http://www.ncdd.org
Open Space	https://www.openspaceworld.org
Presencing Institute	https://www.presencing.org
World Café	https://theworldcafe.com

Fire

What makes a fire burn
is space between the logs,
a breathing space.
Too much of a good thing,
too many logs
packed in too tight
can douse the flames
almost as surely
as a pail of water would.
So building fires
requires attention
to the spaces in between,
as much as to the wood.
When we are able to build
open spaces
in the same way
we have learned
to pile on the logs,
then we can come to see how
it is fuel, and absence of the fuel
together, that make fire possible.
We only need to lay a log
lightly from time to time.
A fire
grows
simply because the space is there,
with openings
in which the flame
that knows just how it wants to burn
can find its way.

—Judy Brown

ABOUT THE GIVING PRACTICE

We blend customized solutions and deep knowledge of the field to help foundations, giving programs and philanthropy-serving organizations to navigate the changing landscape of today's philanthropy. We develop authentic relationships with our clients that allow them to experience joyful, meaningful and effective work. We celebrate philanthropy that is diverse and inclusive as we work to create and sustain strong, equitable and healthy communities.

How We Work

Values first. We help you achieve your goals by working from the values that motivate your philanthropy.

Funder knowledge. We bring decades of direct work experience in foundations. We are part of Philanthropy Northwest, a network of almost 200 family, private, community and corporate funders.

National perspective. We are based in the Northwest and work with clients throughout the United States.

Continuous learning. We emphasize learning in our projects, incorporate the latest ideas from the field, and help you build a knowledge for others to benefit from.

Customized solutions. We work with you as a partner and adapt our approach to your unique organizational culture, skills and ways of working.

True collaboration. We take collaboration seriously. We work with you as a partner and bring to bear our shared experience as practitioners in philanthropy.

THE
GIVING
PRACTICE

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