A Collaborative Process X-Ray

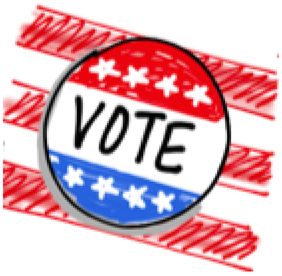
I recently had the privilege of co-designing and facilitating a three month experiment called Aligning for Impact. Building off an initial probe we [wrote about last year](), it was designed to explore how funders – all working towards similar goals – might be more collectively strategic and harness their network potential. Our hypothesis was that a more aligned approach might improve effectiveness in our shared work.

While three months was a short amount of time to experiment with collective approaches, it did provide a glimmer as to what was possible. Overwhelmingly participants reported that having a different type of conversation, in an authentic, emergent, participatory space allowed for important shared learning, all while practicing different techniques to help our network and field work collectively together. It was intriguing enough that we're now designing and launching the next phase of this experiment.

Given that a key part of this work is testing a new way of working that allows for more effective collaboration, and potentially collective intelligence, to emerge, I wanted to take this blog post to pause and write up a bit of an x-ray into the design thinking and tools used to support this collaborative process.

(**Warning!** This is a bit of a wonky process blog, but do keep reading if you're interested in the specific techniques, principles, and approaches that informed this work)

Background



The shared work of the funders in our experiment is civic engagement state Infrastructure: year-round collaborative's of non-partisan groups working to ensure we all have the opportunity to participate in our democracy. Clearly, this is a group that believes in the power of participation and collaborative networks, yet there was a sense that their collaborative practice as funders was not keeping step with the field. We convened this experiment around a key, motivating question:

> *"How can we, as funder's, do what we increasingly demand of our grantees: share information and align our work in the service of shared goals?"*

Assumptions

This experiment was informed by a few important assumptions:

- The challenge we're facing as civic engagement funders is too complex for any one of us to solve alone.
- Our traditional problem solving techniques, while effective, are not enough for tackling complex, wicked challenges (for more on this, read Dr. Jeff Conklin's great piece on shared understanding and social complexity).
- Our current techniques for thinking strategically as a field (in small groups, face to face, informally) cannot scale to allow for collective intelligence or for the agility we need to keep pace with a complex social challenge.
- Therefore, we need to practice collaborative techniques that respect the complexity of the challenges at hand, and that may allow for collective intelligence to emerge.

OK. On to the x-ray.

The power of experimentation

First, and foremost, was the choice to frame this work as an experiment. The hard truth of most do-gooder work is that there are just no right answers. The issues at hand are so socially complex that, most often, we're dealing with gradients of better and worse, with a tremendous amount of uncertainty to navigate.

Science has processes specifically designed to deal with this uncertainty, helping us move forward and continuously learn, which is why we chose to use an experimental framework. All this means is that we started off by clearly outlining:

- A clear challenge which this work was designed to explore.
- A clear hypothesis: how might this experiment tackle this challenge?
- A start date & end date.
- A process for noticing what we learned about our hypothesis, i.e., a plan to evaluate our hypothesis and adapt.

As my colleague Eugene points out, it's pretty hard to be rigorous in hypothesis measurement, but the intention is invaluable, and the end date was an extremely important part of the equation. Yes, it was hard to stop after three months when it felt like we'd just gotten the ball rolling and it was rolling so well! But, in truth, it was the knowledge that this was only three months that allowed everyone to really stay committed to this work when the going got rough. And I promise you, when you're designing an experiment to help tackle social complexity and move through uncertainty, there will be challenging times. Our most challenging meeting was the fourth dialogue, or what I've affectionately come to call the "hump" call. Things were getting messy, complex, and it was really unclear how any of this talking could prove valuable. This is a common stage in any emergent group processes, but knowing there were just four more meetings left in the commitment helped us all trust the process and push through this discomfort.

Start Small

Recognizing that this is an experiment, a probe to test a hypothesis and teach us something more about the complex challenge at hand, it was important for us to start small. In this case, our first probe lasted only three months, and we used all "out-of-the-box" tools to support our collaboration. Borrowing on Lean Startup, you can think of this as the Minimum Viable Product approach: start small, learn, and iterate. Or, as Beth Kanter would say, it was our attempt to crawl on the way to learning how to fly.

Shared understanding, not consensus

Our goal in this initial experiment was to build shared understanding of the challenges and the opportunities to effect change in our shared field. Importantly, we weren't looking to agree about what the field needs. The metaphor that came to define this phase of work was that of the blind men and the elephant. While the group may not have been contributing lots of new analysis to the field, by sharing what we experienced from different perspectives, we were collectively illuminating the elephant.

From this place of collective illumination there were lots of divergent theories around what the elephant may need, which is an indication of a healthy system; a diversity of approaches help build a more resilient field. I think too often when we meet and work in groups we're working to build consensus: to get everyone to agree that my point of view is the way to move forward. But, approaching collaborative work with an aim of building shared understanding, as opposed to persuasion and agreement, can help unlock collective action in a diverse group. For us, starting from a point of shared understanding helped us to embrace differences.

Shared Display

Perhaps the simplest and most powerful intervention to help a group build shared understanding is the use of a shared display. Eugene Eric Kim recently wrote a great piece about why a shared display is so important for building shared understanding. The long and short of it: just five minutes of complex group conversation will quickly become too much for any of us to hold accurately in our heads. This simple fact explains why whiteboards are so powerful.

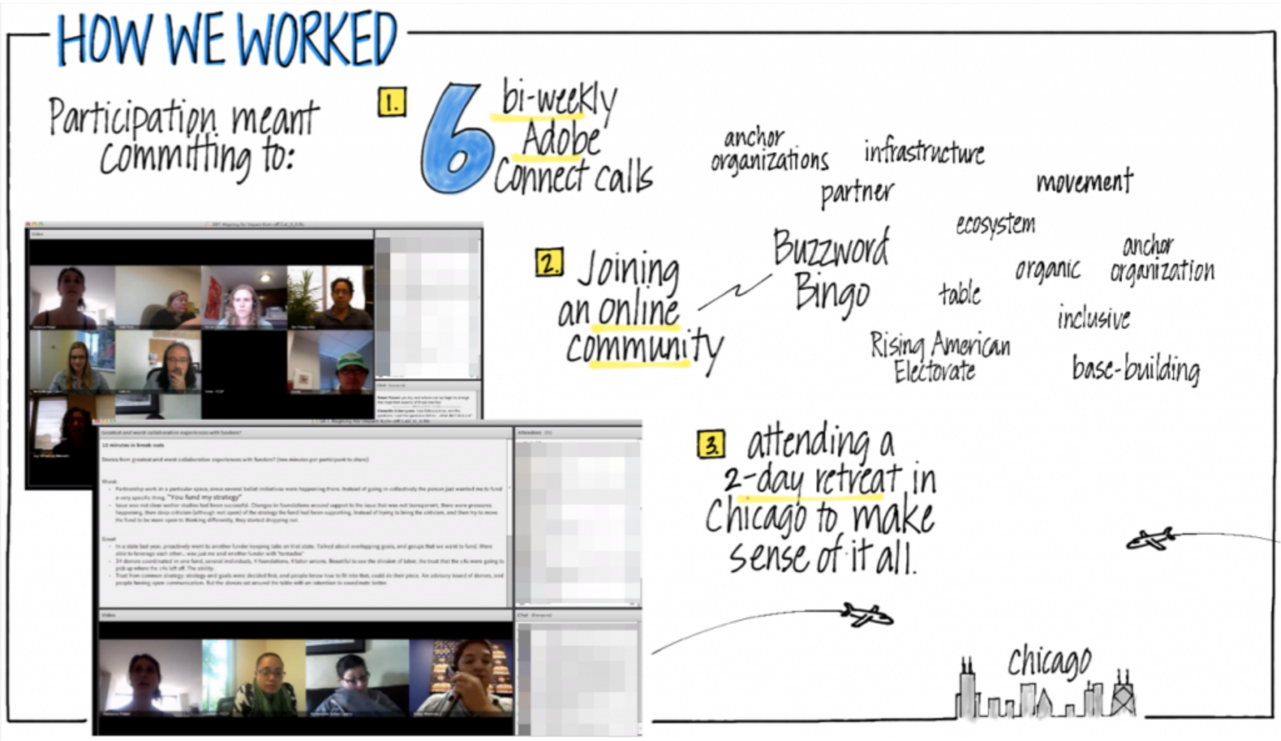
In this process, we used a hybrid of meeting notes to track the conversation and visual mapping to provide synthesis and meaning through the complexity. Called Dialogue Mapping, adapted from IBIS, I was lucky to learn about it from its inventor Dr. Jeff Conklin.

Taking notes during meetings is not unique. However long meeting agendas, painstakingly and accurately transcribed from a lone computer, rarely realize their potential. Not only do they only reflect one individual's interpretation of what happened, they're generally inaccessible; they're so long without any additional sense-making.

Mapping is not unique. Graphic facilitation and various visual mapping systems seem to be growing in prominence, and they do help us make sense of notes by adding a visual layer of sense-making. However, these, too, tend to reflect just one person's understanding, and rarely help push a conversation forward.

What makes either of these tools transformative is putting them at the center of the conversation, and using them in real time to build our shared understanding. By dialogue mapping the meetings we created something together in this conversation, could point to it, and share with our missing colleagues to invite their perspective / adaptations. More than a meeting record, it is a fantastic sense-making tool.

Treat virtual spaces with as much (or more) intention as face to face spaces



Trying to confront the challenge we saw around the relationship between geography and strategizing, we experimented with tools that might allow us to strategize, in larger groups, across time zones. The persistency of our shared display in the form of Dialogue Maps was a big part of how we worked to achieve this, but the real star of the process was the tool we chose to enable this virtual space for collective strategizing: Adobe Connect. We actually met using Adobe Connect for three months, and let the relationships and shared understanding developed during this time help launch us in to action when we convened face to face at the end of the process.

Adobe Connect was transformative because of what it enabled us to do. But Adobe Connect itself did not transform us. It was the work we did creating the space, and very importantly, creating Adobe Connect sessions with as much planning, care, and attention we would a face to face convening. So what were the key things we did to create the space in every meeting?

- Importantly, we planned every single dialogue using this meeting template: keeping goals at the center, and thinking through the timing and the purpose of all the different modules.
- What is fantastic about Adobe Connect is it allows you to shape group physics just like you would rearrange a real room to suit your group needs. During the check-ins, a more relational time, we had a "room" where everyone's video was the main part of the screen. During big collective sense-making times, we removed the videos and maximized the shared display space, leaving only chat rooms on the side. After break-out spaces, we put the notes from every break-out group in the main space for a "gallery walk." We included breaks just like you would in a real meeting!
- One very simple technique to encourage participation is the use of a check-in and check-out at every meeting. As tempting as it was to rush past this step, they provided important relational value as well as feedback at the end of every meeting that helped move the conversation forward. As Kristin writes so eloquently, this one intervention alone can make a big difference in a group process.
- To allow for a give and take between participation, deep thinking, and collective sense-making, every meeting had a combination of large group conversations and small group conversations.
- Recognizing that we have introverts and extroverts in every group, and that it's not always easy to speak up on a large conference call, we ensured there were

> multiple ways to participate. The check-ins help invite everyone to have their voice in the room, and we always had a chat box that was an extremely active space in which to participate. There were many different ways to indicate “I’m listening, thinking, and contributing” besides simply speaking up in a group of 15 people.

Of course you could argue there was a bias in our process towards the connected, and towards those that were good at trouble-shooting. We did notice a decrease in the quality of participation, an imbalance of sorts, when the group had some video participants and some simply audio participants. We tried to correct for this, but we never found the perfect system.

Make it playful!

And ultimately, the reality that we can never get it perfect, is what drove us to keep fun and playfulness at the forefront. Technology can be frustrating, but I’m going to make a leap and say it’s not the technology that’s frustrating, it’s trying new things, or things that aren’t working, that is frustrating. A colleague once pointed out to me that all technology has quirks and bugs: the difference between the programs we know and love and the new ones we hate is the difference between the bugs we know and the bugs we don’t know. Our offline lives are not immune to these “bugs” either; the food doesn’t show up, the air conditioning breaks, the window won’t open, gosh darn that pen ran out of ink again.

Doing so many things that were new for all of us (dialogue mapping, web-conferencing, digital break-out groups, shared facilitation, emergent decision making) we knew things would go wrong, and when they did go wrong they’d be doubly frustrating because they were unfamiliar frustrations. So we tried to design a space that encouraged us to have fun: to remember that we’re all human, as such things don’t work out perfectly, and that is ok. Laugh, shake-it-off, curse mercury in retrograde, and keep going! I was most proud of our group for their ability to push through, preserver, keep laughing, even when things went wrong and it felt like we just didn’t have time for things to go wrong.

What’s Next

As mentioned, we’re already biting off the second phase of this work. It’s proving to be scary, challenging, and promising all at the same time. If you’re interested in regular updates regarding the geeky, process side of this experiment as it continues, please drop a note in the comments or shoot me a message at rapetzel@gmail.com and I’ll add you to the list!