Setting the Stage for Learning in Groups

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By all reports, foundations are using their ability to convene more than ever to bring grantees together for mutual learning. While that's a trend to be encouraged, I've also heard a good deal of muttering among non-profits about the frequency with which they're being brought together by different funders. A bit more coordination among the conveners would certainly be beneficial for all involved. But I would hypothesize that another critical factor behind "convening fatigue" is that we often don't design our meetings to maximize the opportunity for real learning.

I've been fortunate over the past few years to be exposed to a variety of group process techniques for evoking "collective intelligence." The beauty of the concept is its simplicity. The fundamental premise of collective intelligence is that all of us are smarter than any one of us. It's an idea that resonates intuitively for most of us, but we don't always structure our gatherings to effectively tap all the wisdom present in the room. As I've applied these ideas to meetings I've facilitated, I've found that not only do participants respond enthusiastically, but also that the quality of our work together has been amazingly high.

How can we think differently about setting the stage for organizational learning? It's really not that difficult once you embrace the notion of collective intelligence. While it may not be the answer for every situation, there are a variety of techniques for pursuing this path. I'd like to briefly introduce four here, which I've used with very positive results. I've also provided some background references for those who would like to learn more.

Scenario Thinking engages the wisdom of a group to imagine a set of plausible alternative futures and to chart potential organizational strategies for each of those possibilities. Katherine Fulton, Diana Scearce and their colleagues at the Monitor Institute and Global Business Network have pioneered this technique with foundations and other non-profits. As they note, scenario thinking is most appropriate in situations where you working in an uncertain environment and you are dealing with a strategic issue where the solution is unclear. The leadership of the organization must also be supportive and the culture must be open to genuine dialogue and change.

To greatly simplify the process, it typically begins with a series of interviews to surface assumptions and pinpoint the question that will drive the inquiry. The group then brainstorms a list of "driving forces" that will shape their environment over the next 5-10 years and prioritizes the two they feel are likely to be the most significant and also most uncertain. Those two forces are then arrayed on axes from less to more and those axes are used to create a simple four-cell matrix. The group then divides to flesh out scenarios for each of the four cells as well as strategies the organization might pursue in those environments. A fifth group may be asked to identify "wild card" events that could change everything. The groups then reassemble to share their scenarios, and decide together which they feel is most likely to actually transpire. The resulting synthesis is used for action planning, with subsequent meetings scheduled for sharing feedback.

Charrettes bring diverse participants together for an intensive period of time to design a solution to a common problem. They are widely utilized in urban planning to incorporate

the ideas and aspirations of multiple constituent groups into public decision making about land use. The word "charrette" (French for cart) comes from 19th century Paris, where the Ecole des Beaux Arts would send a charrette around the city at the end of each term to collect final projects from the students' ateliers. As legend has it, students would frequently ride on the charrette itself, frantically completing their work as it was being delivered to their professors for grading. Charrettes retain this element of working quickly together to meet a deadline, making it more difficult to become bogged down in petty disagreements or unnecessary details.

Charrettes typically involve multiple teams that have been assembled to bring together different talents, levels of experience and points of view to bear on the problem. The teams are presented with a set of design criteria to guide their inquiry as well as a deadline. One member may be appointed team leader or an outside facilitator may be engaged to help keep the process on track. Final presentations are publicly shared with the other groups for questions and comments, and an outside "jury" of experts (or representatives of the larger community) may be invited to critique the teams' designs. Often, the final step in the process is to combine the best ideas from the different teams' concepts into a single, shared solution.

The World Café, originated by Juanita Brown and David Isaacs, had its beginnings in an insight many of us have shared…that the most engaging and meaningful conversations we've had at conferences often occur over coffee or tea during the breaks from the formal meeting. Brown and Isaacs asked the question: what would happen if we designed an entire meeting around that simple principle? The name "World Café" reflects and honors the universality of these kinds of café conversations across cultures around the world.

While there are many possible variations, a classic World Café arranges the meeting space to resemble a café-type setting, with small tables for four topped with paper "tablecloths." Groups are provided with markers and given a fixed period of time to address a common question. They are encouraged to make notes, doodle and share the thoughts that emerge from their conversation in writing on their tablecloth. Then, three members are asked to join other groups while one remains as the host. The next round of conversation begins with the host sharing the essence of the previous conversation and the new guests describing highlights of theirs. They add their thoughts to the tablecloth, look for patterns, and draw connections among the emerging ideas.

Depending on the size of the group, they may once again switch tables one or more times to continue the conversation before eventually being asked to return to their original table. The initial groups then synthesize all of the content that has accumulated on their tablecloths, and those visual records are shared with the entire meeting, either via a guided tour of the tables (for smaller groups) or a gallery (for larger groups). The final step can be to consolidate the consensus ideas that have emerged into a grand synthesis.

Open Space Technology, as its name implies, is perhaps the most freewheeling of these techniques. It puts full responsibility on the group to create the most stimulating environment for its own learning. Developed originally by Harrison Owen, Open Space is a powerful way for people to connect around common interests and questions. An Open Space gathering typically begins by collecting and sharing the questions that individual members of the group would like to tackle. Subgroups then form voluntarily to work

together on those questions that engage them, with a commitment to report back to the larger body. Depending on the time available, each individual may choose to participate sequentially in several different topical groups.

Four deceptively simple principles and one law set the stage for Open Space:
- Whoever comes is the right people;
- Whatever happens is the only thing that could have;
- Whenever it starts is the right time;
- When it's over, it's over.

The law is the "law of mobility." It states that if, during the course of the gathering, any person finds himself or herself in a situation where they are neither learning nor contributing, they must go to some more productive place.

Open Space gatherings can last anywhere from several hours to several days. Unlike the three methods already described, the questions are entirely generated by the participants, although the organizers can put a general frame around the conversation, and can also shape the dialogue by who is invited to participate.

Setting the Table

These very brief descriptions can't begin to do justice to the richness of learning opportunities offered by each of these four approaches. But they should give you a sense of the range of possible ways we might change the way we structure our meetings, both within our organizations and when we convene others. While each approach is more appropriate for different challenges and questions, they all share some characteristics in common:

- Every participant is actively engaged
- Creative, spontaneous ideas are encouraged
- Collective thinking is informed by the wisdom of each participant
- Cross-fertilization of ideas is fostered
- Time limits on the process focus group energy
- Ideas are synthesized across groups to achieve shared solutions

The process variations are only limited by your imagination. I encourage you to consider these simple principles as you plan your next convening in order to better set the table for real learning.

For More Information:

Diana Scearce, Katherine Fulton et al. <u>What If? The Art of Scenario Thinking for Nonprofits</u>. Emeryville, CA: Global Business Network, 2004.
Available for download from www.gbn.com

Bill Lennertz & Adrian Lutzenhiser <u>The Charrette Handbook</u>. Chicago:
APA Planners Press, 2006. Order from: www.planning.org/APAstore/
More information on charrettes at www.charretteinstitute.com

Juanita Brown, David Isaacs et al. <u>The World Café: Shaping Our Futures Through Conversations that Matter</u>. San Francisco: Berrett-Koehler Publishers, 2005.

For more information on World Café: www.theworldcafe.com

Harrison Owen. Open Space Technology: A User's Guide (2nd Ed.) San Francisco: Berrett-Koehler Publishers, 1997 www.bkconnection.com
For more information on Open Space: www.openspaceworld.org

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