

# COLLECTIVE LEARNING FOR CO-CREATIVE ENGAGEMENT<sup>1</sup>

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*“Complex, interdependent issues such as these are increasingly shaping the context for strategy. Yet the pressures created by these very issues tend to keep leaders in a continual “doing” mode, with little or not time for reflecting and real thinking. We believe that there is a greater need than ever for leaders to meet and genuinely “think together” – the real meaning of dialogue. Only through creating such opportunities can there be any hope of building the shared understanding and coordinated innovative action that the world desperately needs.” Senge, Jaworski, Scharmer & Flower - Presence<sup>2</sup>*

*“We need to create an environment that can focus on something in its complexity, rather than rushing through the shopping list of 65 items on the agenda that we “need” to discuss today with our stakeholders. Always we seem to have this sense of urgency to make progress, yet any progress we do make often ends up being superficial, and not meeting expectations of all stakeholders. Ultimately, this means that we have to come back anyway. When it comes to multi-stakeholder engagement, it is better to make haste slowly.” Peter Hill<sup>3</sup>*

## INTRODUCTION

I believe that magic can happen in groups, organizations and communities, where the ‘many’ become one coherent heart, mind and intent, releasing extraordinary creativity and power for collective action and co-creation. Only rarely does this occur spontaneously and effortlessly. Tapping collective intelligence and wisdom usually requires an investment of time spent together sharing, exploring, discovering, learning, bridging, dreaming and planning. A deeply compelling question must catalyze the group’s central intention. A foundation of respect and civility among members is paramount. Appropriate use of process and design matters. Often, collective wisdom only arises when groups have the courage to go through the chaos and mess of their differences, have surrendered to the possibility of doing anything the old way, and are committed to finding their way through to wholeness and integrity. This is the work of the Collective Learning and Co-Creative Engagement.

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<sup>1</sup> Note: Originally, I wrote this article as a chapter for a book that Ann Svendsen and I attempted to co-write over a several year period as we also collaborated to design workshops and co-author other professional articles. I’d like to acknowledge the influence of Ann’s thinking as I’m sure it has seeped into this paper directly or indirectly, though the primary authorship and content of this paper resides with me.

<sup>2</sup> Peter Senge, Otto Scharmer, Joseph Jaworski, and Betty Sue Flowers, *Presence: Human Purpose and the Field of the Future*, The Society for Organizational Learning, 2004

<sup>3</sup> Interview with Peter Hill, OCIPIP, June 2002

## What is Collective Learning?

Collective learning is essentially “a social process that produces intellectual synergy of many minds coming together to bear on a problem, and the social stimulation of mutual engagement in a common endeavor. This mutual exploration, meaning-making, and feedback often leads to better understanding<sup>4</sup>.” Through this social process of learning, the people in a group, whether at a meeting, multi-stakeholder event, community gathering or organizational retreat, share, analyze and generate information, developing collective insight and understanding around the mutual issue, and aligning and building their capacity together to create the results they desire.

Collective learning only happens when the *whole* group becomes more knowledgeable and informed about the issue in its entirety, including the deeper forces, dynamics, pressures, relationships, and structures underlying the presenting symptoms. When such insight happens, the knowledge, intelligence and capacity of individual participants and not just the convening organization's, are enhanced around the issue. Leverage points for action can then be identified either at the level of independent members of the system or of the system as a whole. Through this mutual understanding, individuals are better placed to align their independent actions with the interests of the larger system. The group as a whole is also able to generate, or at least recognize, sounder solutions that address root causes rather than symptoms, and that tap the differing strengths and knowledge of multiple knowledge bases to generate more innovative solutions and responses.

## Why Is Collective Learning Important?

*“None of us is as smart as all of us. ...the problems we face are too complex to be solved by any one person or any one discipline. Our only chance is to bring people together from a variety of backgrounds and disciplines who can refract a problem through the prism of complementary minds allied in common purpose.”<sup>5</sup>*

Whether our quest is to create sustainable value in partnership with the entire value chain of suppliers, employees and customers, or our need is to solve complex social issues and wicked<sup>6</sup> environmental problems, Collective Learning is an essential process for integrating and aligning diverse perspectives and knowledge. Over the past 25-30 years, our collective grasp of the interconnectedness of economic, environmental and social systems has risen greatly. We increasingly recognize that more synergistic, innovative and sustainable solutions can ultimately be developed when the collective intelligence and multiple perspective of many minds is focused together.

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<sup>4</sup> Golub, J. (Ed). *Focus on Collaborative Learning*. Urbana, IL: National Council of Teachers of English, 1988.

<sup>5</sup> Source: The Secrets of Great Groups, by Warren Bennis, *Leader to Leader*, No. 3 Winter 1997; Leader to Leader Institute Web site, <http://leadertoleader.org/leaderbooks/L2L/winter97/bennis.html>

<sup>6</sup> “Wicked problems have incomplete, contradictory, and changing requirements; and solutions to them are often difficult to recognize as such because of complex interdependencies. Rittel and Webber stated that while solving a wicked problem, the solution of one aspect may reveal or create another, even more complex problem. Classic examples of wicked problems include economic, environmental, and political issues (for an extreme case, consider what it would take to “solve” terrorism, where even the term *terrorism* is highly controversial and difficult to define). Problems whose solution require large groups of individuals to change their mindsets and behaviors are likely to be a wicked problem.” (Source: www.wikipedia.org)

Equally important over the longer term, engaging in Collective Learning builds the level of social capital that is necessary for successful action. Reciprocal trust among stakeholders develops through respectful dialogue around thorny issues and in the struggle to understand messy reality. Preconceived relationships between self (our goals and values) and others' change as new learning occurs. People in a group become more attuned to the values and interests of all other members in the organization or community. This awareness of their interconnectedness and interdependency in the system enhances their sense of responsibility towards one another.

A greater sense of responsibility towards the "other" may be awakened through genuine and participative forms of dialogue.<sup>7</sup> This may create an opportunity for healing relationships between adversaries. In some instances, the process of Collective Learning gives previously voiceless members of a community the recognition and acknowledgement needed for healing and reconciliation to take place, allowing the system to move on beyond past history and strife.

During Collective Learning, individuals have a non-adversarial opportunity to see the whole system rather than just their limited aspect, and to perceive their problems and issues as inter-related and mutually solvable, rather than opposed. Through discovery and dialogue, members of a group learn of their collective assets, capacities, and opportunities, as well as their needs, liabilities, restrictions, and problems. Collective learning allows alignment and consensus to emerge regarding the need for, and the type of change that would improve the overall well-being of individuals and the larger whole<sup>8</sup>.

Collective Learning strengthens capacity<sup>9</sup> within a social system or network over time. This is particularly important in a turbulent environment or in times of crisis requiring flexibility, adaptability and quick response. Where authority to act resides within a specific organization, internal and external stakeholder support of decisions will ensure smooth unobstructed implementation. In other instances where collaboration is needed to implement a particular solution, learning together produces the necessary level of understand, ownership and commitment for concerted action among diverse players.

## **COLLECTIVE LEARNING ANTECEDENTS**

### **Rush to Solution**

Modern society has a bias for action over reflection. Learning is often considered a discretionary luxury, and not 'real' work. People believe they are paid primarily to act rather than think. Time spent in learning and analysis is often seen as an unnecessary delay to quick response and issue resolution. Rather than investing time to answer questions such as: "What precisely is the issue (problem or opportunity)? What are its causes or contributing factors? What are the cause and effect relationships?" - people rush to solution. Paradoxically though innovation is currently accepted both in the private and public sectors as essential to responding to emerging

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<sup>7</sup> Calton, p 9.

<sup>8</sup> Joe Flower, "A Tool Kit for Building A Healthy City," National Civic Review, Vol. 87 #4, Winter 1998.

<sup>9</sup> Capacity of a stakeholder network includes the collective strengths, resources, competencies, relationships, practices, alliances, leadership, assets, structures, processes, behaviours, institutional arrangements, tangible products and services, etc.

challenges and opportunities, time invested in the learning from which innovation arises is undervalued, and often resented.

Defining and understanding complex, cross-boundary issues is time-consuming and difficult. Bringing a group with diverse views to the table to address complex issues requires considerable effort, planning, and energy. It is natural then, particularly in a crisis involving human and ecological impacts, for people to be impatient with time invested in collective learning. The rush to solution however, tends to ignore the complexity of natural systems and to generate overly simplistic approaches for sustainable development and ecosystem health that focus on symptoms rather than root causes. This rush to consider alternative solutions and actions is seductive as it creates the illusion of progress and forward movement, and offers the enticing, though false, possibility of 'getting this over with so we can return to doing our *real* work'.

The sense of urgency that characterizes our modern world reflects our attachment to linear and sequential time, called *kronos* by the Romans, and most of us believe that it is in scarce supply. Learning, however, like creativity does not adhere to clock time, but depends on *kairos* - the ancient Greek word for "right or opportune moment" when something can happen, like crocuses emerging from the snow in spring, like the cycle of seasons and tides, and like childbirth.

The result of kronos-driven schedules is that often, we end up solving the wrong problems or deciding on half-baked strategies. Instead, when faced with a complex issue, groups, organizations and communities need to invest in collective learning, acquiring new frameworks to define, analyze, and understand their issue before selecting what to do about it. A new maxim is needed to counter the false beliefs of "we don't have time" and "learning is not real work -: "go slow at first to go fast later!"

### **Legacy from Quality & Learning Organizations**

In the 1980's, as our organizations began to accept the new quality imperative, it became apparent that delivering on the quality promise could not be achieved as a one-time program. Rather, we came to appreciate that a long-term ongoing *process* of continuous learning and improvement supported at all levels of the organization and using interdisciplinary approaches was essential to meet the ever-changing needs and expectations of our customers. Similarly there is a pressing need around the type of dynamically changing, complex health, security, social, economic, political and environmental issues such as those listed in the Table on the next page, to adopt a collective and ongoing learning process.

### **Team Learning**

MIT professor Peter Senge introduced a robust framework of five disciplines in 1990 to help both private and public organizations become learning organizations able to consistently deliver quality products and services: systems thinking, shared vision, common mental models, team learning, and personal mastery. Successful learning organizations, as described in his seminal book *The Fifth Discipline: The Art and Practice of the Learning Organization*, are

“...where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning to see the whole together.”<sup>10</sup>

Teams, not individuals, are the fundamental learning unit in modern organizations, thus team learning is a vital human competency of learning organizations. At its best, team learning is a multi-disciplinary process involving the process chain from outside suppliers through to internal departments and external customers. Team learning is a never-ending process of people cooperating within dynamic systems, acquiring and sharing new knowledge, skills, and abilities to constantly improve product and service quality.

Collective learning is the multi-stakeholder equivalent of team learning in organizations, spanning communities of interest and concern around issues that affect them. Collective learning, like team learning, is a social or group process to build shared understanding, align the

thinking of diverse stakeholders, and develop their capacity to create desired results together. When a group of diverse people come together in a group within an organization or community, their differences in perceptions lack coherence. Energy can and is often wasted in unproductive conflict and animosity. The process of learning together can help align personal interests within a larger more expanded view of the issue, and to help bring about coherence from shared understanding, purpose and vision.

<b>Examples of Complex Issues in the Emerging Context</b>	
<u>Global:</u>	<u>Local:</u>
<b>Health</b>	<b>Health</b>
Epidemics (e.g. SARS/AIDS)	Air Quality
<b>Environment</b>	<b>Environment</b>
Climate Change	Degradation of Bio-Regions
Species Extinction	Land Use Conflicts
Conflict Over Water	<b>Security</b>
<b>Security</b>	Theft & Property Crimes
Terrorism/War	<b>Social/Economic</b>
Youth Violence	Digital Divide/Local Jobs
<b>Social/Economic</b>	Native/Aboriginal Rights
Rich/Poor Divide	Diversity/Multi-Culturalism
Urbanization/Globalization	

Collective learning differs from *individual* learning where a single person or organization enhances

their knowledge, intelligence and capacity through the acquisition, interpretation and processing of information. Individual learning is actually what occurs in the traditional ‘hub and spoke’ approach to stakeholder engagement, and *not* collective learning as is presently held in our current approaches to ‘consultation’ with stakeholders. Contrary to this prevailing view, stakeholder consultation through focus groups, surveys, town hall meetings, position papers, royal commissions, and the like are models of engagement where the convening organization is at the centre of learning. While *it* becomes more knowledgeable about the issue by receiving input and feedback from stakeholders, interveners rarely do. Instead, such processes foster debate, where different stakeholders strive to present their particular perspective and ideas in as convincing, forceful, and compelling a manner as possible in order to convince others over to their point of view.

<sup>10</sup> Senge, *The Fifth Discipline: The Art and Practice of the Learning Organization*, page 3, 1990.

At the end of these types of traditional stakeholder consultations, most proponents have not shifted from their starting position; if anything, they have become more entrenched, and hardened against other perspectives. This explains why the forthcoming recommendations or decisions of the convening organization are rarely found acceptable to the majority. Collective learning did not take place, and only the convening organization now 'sees' the whole issue. However wise and creative the solutions that it may put forward at the end of such consultations, broad stakeholder support more often than not is withheld, because individual stakeholders have not shifted from their initial position.

## **Systems Thinking**

Einstein said, "*We cannot solve problems by using the same kind of thinking we used when we created them.*" We know this, yet we persist in trying to do so. The path of least resistance when we first see a problem is to go with what we already know, and to trust our present limited knowledge and experience, including whatever biases and blind spots we have. To counter this natural inclination, during the quality revolution, employees began to be trained in new systems thinking skills such as conducting root cause analyses and a plethora of other 'scientific management' analytical tools that would enable them to generate solutions that could *really* solve quality problems, by addressing the underlying causes behind them.

Systems thinking theory, the cornerstone of the learning organization, provides the framework for understanding problems as wholes rather than as separate parts. Learning organizations encourage people to see their work as part of a whole, a system of interrelationships and processes that depend on each other. Sustainable solutions are seen to depend on understanding the interplay of relationships among people and processes, of cause and effect dynamics, and of variables that influence one another to produce results.

Learning is essential to the discovery or invention of enduring solutions to problems. Very few if any complex issues can be solved through applying quick fixes. Yet in our rush to solution and impatience with the learning process itself, more often than not, we tend to perpetuate the existing system through the adoption of first order change solutions – if we are lucky! Quick fixes may engender unintended consequences; may shift the burden to another part of the system; may push beyond natural limits to growth leading to reversal and decline; may cause an escalating and vicious cycle of competition and aggression; may erode a common resource to the breakpoint; may reinforce one group's success at the expense of another; and so on<sup>11</sup>. These types of undesirable results are attributable to underlying system dynamics that are usually not apparent from simple analysis.

Quick fixes, or first order change solutions, are single-loop or adaptive solutions designed to improve an existing structure based on what is already known. Such solutions are focused on order and control, by detecting and correcting errors in relationship to existing norms and rules (asking, "*are we doing things right?*"), rather than addressing root cases. Unfortunately, traditional stakeholder consultation methods rarely surface much beyond information of the symptoms as perceived by different stakeholders. This explains why so many well-intended solutions following such consultations fail to bring about any long-term change to chronic issues. They address surface symptoms rather than focus on true leverage points for lasting transformation. Time and again in daily newspapers, for example, governments of various

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<sup>11</sup> *The Fifth Discipline*, Appendix 2: Systems Archetypes, pp. 378-381.

levels will announce significant investments of funds and resources towards problems such as child poverty, prejudice, drugs, gun proliferation, high school dropout rates, and so on. Unless funds are thoughtful geared towards programs designed to address the underlying root causes, then sadly, failure is a predetermined outcome.

Sustainable solutions at a minimum usually require that stakeholders in organizations and communities engage in a process of double loop learning to examine what factors are causing the current system to operate as it does (asking, “*are we doing the right thing?*”). Double loop learning is about taking a ‘second look’ at a situation by questioning the relevance of the underlying set of rules, conditions, and structure that are leading to the result, rather than simply perpetuate the status quo (often by throwing money at a symptom and hoping for the best).

Sometimes leverage points for achieving lasting change require triple-loop learning (asking, “*why are we doing this at all?*”) – and challenging the very foundation of beliefs and assumptions upon which the current system is functioning. For example, the right to bear arms (a legal foundation) in the United States is at the root of the proliferation of guns and associated gun-based injury and death; similarly cultural or religious beliefs may be at play such as the caste system in India and its systemic oppression of whole classes of people<sup>12</sup>.

*“If I had an hour to solve a problem and my life depended on the solution, I would spend the first 55 minutes determining the proper question to ask, for once I knew the proper question, I could solve the problem in less than 5 minutes.”* Albert Einstein

### Seeing the Larger System

*Hishuk ish tsawalk – “everything is one”.* (Saying of the Nuu-chah-Nulth First Nations Tribe, located on the west coast of Vancouver Island.)

Dividing an elephant in half does not produce two small elephants, it produces a mess<sup>13</sup>. Beyond building a shared base of information, another outcome of Collective Learning is for all relevant and affected members of an organization or community to see the whole system underlying the problem or opportunity that has brought them together. Leverage for sustainable

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<sup>12</sup> See *Societal Learning and Change: How Government, Business and Civil Society Are Creating Solutions to Complex Multi-Stakeholder Problems*, Steve Waddell, p. 16, Greenleaf Publishing 22005. These concepts of single, double, and triple-loop learning (and of first, second, and third order change) can be better understood through an example. Every year, farmers independently determine what crops to plant. This often leads to oversupply and very low market prices. In single-loop learning, a farmer would observe what happened to the price of wheat last year and decide to switch to a cash crop like canola. Single loop learning involves using existing knowledge to effect change within the current system and is useful when standard predictable outcomes are desired. In our example, however, if many farmers arrive at the same decision independently, in the next year the price of canola will fall dramatically. A different level of learning is needed to achieve different results. In double-loop learning, farmers might decide to get together and agree to establish and abide by grain quotas to regulate total wheat and canola supply in order to ensure an economically viable price for farmers and to avert over-production. This represents second order change (challenging the traditional rules of the game; going beyond what is known), where independent farmer decision-making has been modified, leading to new collective behaviour and new production rules. In triple-loop learning, the game itself is challenged leading to different ways to achieve desired outcomes. For example - many Canadian Prairie farmers have switched some of their production from grain to legume crops such as soy, peas and corn, thereby bypassing the grain market altogether, and accessing new ones.

<sup>13</sup> Senge, ed. Cit., pps. 66-67.

action cannot be discovered from examining only one small piece of a larger puzzle, or acting solely from one's own knowledge base. Rather, it requires an examination and understanding of relationships, interactions, patterns, linkages and other correlations, dependencies and interdependencies within and across stakeholder boundaries.

Seeing the system anew requires new insight into cause and effect; through recognition of previously invisible or unknown relationships; and through inquiry into assumptions and deeply held beliefs. Interviews with pioneering scientists and entrepreneurs reveal that such a deeper level of learning is possible, one that "create(s) increasing awareness of the larger whole – both as it is and as it is evolving – that leads to actions that increasingly serve the emerging whole."<sup>14</sup>

In conflicted situations, seeing the larger system involves an analysis of the present situation and exploration of probable future scenarios. This further builds common ground between diverse stakeholders, and begins to promote ownership of the "mess" – the contradictory, confusing, chaotic, fast-shifting, often negative present reality. This process is not without its anxiety, pain or confusion, yet is it important for a conflicted multi-stakeholder group to grapple with the collective mess. Such collective ownership of the issue fosters a shift from the illusion of "we know what is going on; they are the ones who are confused", to "no one stakeholder knows fully".<sup>15</sup>

A new perspective or a change of consciousness is required, says Einstein, to see the best solution. If we seek new ideas and solutions, we must be willing to ask new questions that open us up to new ways of thinking, help us to redefine and reframe the original issue, and look for the validity in opposing points of view. Traditional stakeholder consultations do not typically invite those involved to suspend what they know as *the*' right answer – usually their own, in a search for multiple, equally plausible right answers. Truly innovative responses require letting go of what is known and daring to thread the terrain of the untried and unproven at the edge between order and chaos<sup>16</sup>. How do we do this in a multi-stakeholder context?

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SIDEBAR: The Nechako Watershed Council has made a conscious commitment to entering into reflective dialogue in order to understand the system fully. According to the Chair of the Council, Henri Klassen, commitment to looking at the whole and the interests of all has resulted in the Council's ability to clearly sense the depth of the value of the "parts" over time.<sup>17</sup>

*"So many small "parts" were expressed in meetings, but not clearly seen by the larger groups who had bigger "parts". The stories seemed fragmented at first (we had some 25 to 27 different issues to sort out), but when we started listening to each on their own, and asking, "where does this belong?" and "how does this relate to other parts?" then the whole picture started to make sense, and we began to see our way out of the confusion and complexity of the issues.*

*We found it very important to take the time to simply understand each issue on its own merit. Once we did that, the issue would just sit there and rest, and not be superseded by another issue. We would not leave that issue until everyone understood and recognized it as an*

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<sup>14</sup> *Presence: Human Purpose and the Field of the Future*, Senge, Flowers, Scharmer, Jaworski, pps. 9-10

<sup>15</sup> Weisbord and Janoff, *Future Search: An Action Guide to Finding Common Ground in Organizations & Communities*, Berrett-Koehler Publishers, 1995.

<sup>16</sup> Toke Paludan Moeller, *Art of Hosting Meaningful Conversations*, training seminar held at Rivendell, Bowen Island, BC, Canada. December 2004.

<sup>17</sup> *Source: Research interview with Myriam Laberge, June 26, 2002.*

*important issue to be considered in the final analysis. Then the person who brought the issue forward could be assured that the issue would not be dismissed or marginalized, and that somehow, it would be considered and addressed in the solution.*

*Over time, people started to trust this process. Now nobody comes forward with “I want this”, but simply presents the problem as they see it, knowing that the Council will analyze it thoroughly, and take the time to fully understand it, doing whatever research is needed in order to do so.”*

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## THE ART AND PRACTICE OF COLLECTIVE LEARNING

Collective Learning occurs through group conversations around questions that matter. Such conversations can take place either through one-time, multiple or ongoing activities involving in-person meetings or workshops, online- or tele- conferencing, or multiple engagement processes involving a combination of all of these. The goal of Collective Learning in a stakeholder network is to increase the collective knowledge, understanding, and capacity of members around the issue, such that independent individual action and decisions, as well as any collective action, can be aligned with the system's interests.

Collective learning in a multi-stakeholder network involves thinking and reflecting together about complex issues in order to generate new insights and possibilities. Such thinking must rise above the lowest common denominator of understanding often associated with debate to tap the full potential of collective intelligence and wisdom in the group. As illustrated in the story below, collective learning must also enable people from different social, cultural, political, geographic and other boundaries to bring out their differences productively, and begin to make sense of them in understanding the larger issue that brings them together.

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SIDEBAR: “It is fascinating to be part of a multi-stakeholder group where the connectedness between people around an issue becomes apparent during the course of the conversation,” says Peter Hill of his experience when he was Director of the Voluntary Sector at the Solicitor General Department of Canada in Ottawa. The Minister was setting out a new citizen engagement initiative to open up to criminal justice issues around groups at risk. The people who came to the meeting had never worked together before, but all were connected, though through phenomenal diversity, to the subject.

“The way that the Solicitor General listened, the way that people interacted telling stories - personal stories either about themselves or others being at risk - all contributed to collective learning. As the conversation evolved, connections were made among individuals in their roles, preoccupations and interests – between the child prostitute who had worked with the United Nations on how to deal with children at risk; and the policeman who was involved in midnight basketball (*a community initiative to keep kids off the streets*); the academic who had studied groups at risk for years and years, and the Minister responsible for the legal system. It became “real”, seeing the whole or certainly a broader picture than we had come to the meeting with. We started to see the problem more as a system than as a singular issue, with the intersection of many overlapping systems, and gaps where systems should have overlapped but didn't. The original intention was to listen, but what came out were a number of personal commitments by the Minister to work with other Ministers, and to have a second full stakeholder meeting - an amazing seizing of the importance of the need to act based on a new understanding of the

system. Also, some healing happened from people being able to speak their minds without filters in a group that was made up of an exciting and different group of respected people including a politician and cabinet minister.”<sup>18</sup>

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## THE COLLECTIVE LEARNING AGENDA

### Purpose, Membership & Process

A group must develop ways of working together that foster individual as well as group well-being. When the organization or community group first comes together, and before they can or are willing to do any ‘real’ content work, participants must address many issues around their purpose and goals, around membership, and around process and control.<sup>19</sup> Conversations around these issues are sometimes given short shrift because of the mistaken belief that they are eating up valuable time that could be spent on the convening question. In actual fact, taking time up front on these points is a reasonably safe starting point, and creates an early opportunity for agreement and alignment among diverse members of the stakeholder network.

### Issues About Purpose and Goals

*“Clarity of purpose is a sweet weapon against confusion.”<sup>20</sup>*

The questions of “what are we here to do together?”; “what is our purpose?”; and “what type of group/network/organization do we want to be?” are key to ensuring the success of the stakeholder network. Clarifying purpose also includes defining and agreeing upon: “what is the desired outcome?”; “what are the criteria for success?”; “what will our output be?”; and “how will we know if we’ve been successful?”

### Issues About Membership

Participation in a group must be voluntary. Membership questions include, “who is here, and why?”, and “what are their backgrounds, roles, history?” The full diversity of the system must somehow be present in order to tap the collective intelligence and wisdom inherent in the system. While it is not essential to have everyone physically present, experience has shown that initially, face-to-face contact is vital to establish human bonds and relationships. Care must be taken to recognize blind spots, habitual ruts and unconscious prejudices in behaviours and attitudes about membership. Without due attention, it is possible to inadvertently replicate past patterns of excluding or including certain group members or stakeholders based on their power, credibility, or perceived legitimacy,

*“Sometimes you think that you have all of the stakeholders in the room, but you don’t. You may have an effective process, but it will all come to nought if don’t have the all the relevant people in the room. You proceed by initial guesswork and history.*

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<sup>18</sup> Source: Interview with Myriam Laberge, June 12, 2002

<sup>19</sup> Dannemiller Tyson Associates, Whole-Scale Change: Unleashing the Magic in Organizations. Berrett-Koehler Publishers Inc., San Francisco, 2000, pps. 226-233.

<sup>20</sup> Toke Paludan Moller, Some Basic Assumptions About “Hosting” and “Holding” Inspired Learning Spaces, October 11, 2005, Art of Hosting Website.

*You ask people who have worked in the area for names; you invite people to come to you who say they are interested (through open forums, advertisements); and then you ask those people who else should be included. Start by asking yourself these questions: Who are the folks who can help facilitate or influence decisions? Who are likely to oppose or resist change? Whom does this issue affect directly or indirectly? Keep asking, who else has a stake? Who has relevant information? Who don't you want to surprise? Who does not have a voice with a legitimate interest? Who would look at this completely differently?<sup>21</sup>*

### **Issues About Process, Norms & Control**

Coming into a learning process, people will want to know and must clarify together: “what is the process?”; “will my voice be heard and acted on?”; “who will decide and how?”; “who is in charge?”; “what principles and norms will guide how we will work together?”; “what are our expectations of each other?”; and “for how long are we committed to working together?”

Clarity about process, roles and expectations are critical if Collective Learning is to go beyond the restatement of past history and the re-enactment of old habitual patterns and ruts.

Participants must be ready and willing to enter into a new conversation and be open to the possibility that something new can emerge.

A neutral facilitator is essential to help group members resist the temptation to fall back into old patterns of relating and thinking, and remain committed and motivated to the shared goals and objectives. In designing a Collective Learning process, a good facilitator will involve a diverse subgroup of stakeholders in the collaborative planning process to build trust and ownership. Results from earlier session must inform the design for the next meetings, and flexibility must be built into the process throughout to reflect progress, setbacks and to accommodate emergent issues.

Participants must be willing to tolerate the potential ambiguity and uncertainty that often characterizes inquiry and reflection. Bluntly, inquiry suggests that ‘we don’t know’ – a highly uncomfortable stance for most, and especially for members from institutional settings like government. As well, the emotional intelligence and skills of participants contributes to their ability to engage fully in this process of inquiry.

Many successful groups engage in training sessions to develop shared mental models about leadership, respect, and effective group dynamics. Most develop a set of written principles at the start of the Collective Learning phase to guide their functioning and process. Several key principles to consider are: respect; inclusion, and valuing of diversity; the belief that all voices are valid; and a commitment to openness, transparency and maximum information sharing.

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*SIDEBAR: “Before we start working with a multi-stakeholder group, we often provide training to create a common framework and language for working together. We have found this to be better than simply “hoping and praying” that a group will come together and somehow get beyond the “we-them” dynamics. Some of the programs we have found useful include Myers-Briggs, Smart Skills and especially Seven Habits of Highly Effective People. The latter are well known, neutral and cover many of the principles needed by a multi-stakeholder group to help guide their interactions, for example: “seek first to understand, then to be understood”; “think*

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<sup>21</sup> Interview with Lynn Calder, Manager Public Consultation, Resource Safety & Environment, Shell Canada Limited, July 2, 2002.

*win/win”; ‘synergize”. It also provides a maturity continuum for interaction, where dependence is recognized as the paradigm of you are to blame, independence is the paradigm of I am responsible, and interdependence is the paradigm of we can cooperate and create something greater together.”<sup>22</sup>*

*“The Nechako Watershed Council is not a legal society. It is simply an organization of 25 member organizations operating on trust and faith (organizations municipal, provincial and federal government, community representations in the form of environmental, business, society, etc., representing 300,000 people affected by the Nechako watershed area). The Council principles are simple and understandable by most, using household words that most of us use in our families. Our principles include words like inclusive; open and transparent; cooperative; respect; linkages; solution-oriented. There is a difference between agreeing on principles and truly understanding what they look like on the ground. We held small seminars where we acted out various ideas such as “what does it mean to trust somebody?”, “what would constitute not trusting?”, and “what would it look like to breach somebody’s trust?”. Often, people don’t have the same understanding of how to uphold the principles, and they are so fundamental to our functioning that we take the time to ensure everyone understands the same thing about each principle.”<sup>23</sup>*

*“If you could distill important stakeholder engagement principles down to just one, I would have to say Respect. If you’ve got that one covered, all else will fall into place.”<sup>24</sup>*

*“In trying to create an understanding of the ground rules for deliberative dialogue, and how it is different than debate, we found that it worked best when the description of the process and the application of the principles was very subtly done. If laid on thick, people may be turned off, especially if they think you are preaching to them or being condescending.”<sup>25</sup>*

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## **Do’s & Don’ts of First Meetings**

Skipping steps, excluding voices, or reducing time spent in information sharing for the sake of expediency or urgency will ultimately slow down progress. Some of the do’s and don’ts to consider in designing first stakeholder network meetings are listed below.

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<sup>22</sup> Interview with Lynn Calder, July 2, 2002

<sup>23</sup> Interview with Henry Klassen, Chair, Nechako Watershed Council, June 26

<sup>24</sup> Interview with Deborah Eastlick, Communications Specialist & Advisory, Alberta Energy Utilities Board, June 25, 2002

<sup>25</sup> Interview with Peter Hill, OCIPPEP, June 2002

Do's	Don'ts
<ul style="list-style-type: none"> <li>• Allow time to build interpersonal connections.</li> <li>• Be honest about your capabilities/constraints/ decision-making process.</li> <li>• Take time to learn about each stakeholder.</li> <li>• Stress importance of everyone's contribution.</li> </ul>	<ul style="list-style-type: none"> <li>• Set up unrealistic expectations.</li> <li>• Identify one or more participants as expert.</li> <li>• Exclude naysayers if they are willing to follow the process.</li> <li>• Ignore role of objective process facilitation.</li> </ul>

## COLLECTIVE LEARNING QUESTIONS & PRACTICES

### Questions/Focus of Collective Learning

The learning focus, or collective learning agenda of the organization or community group is determined by the its particular purpose. The desired outcome of the Collective Learning is *not* immediately problem-solving or opportunity-creation, though solutions and new ideas may naturally emerge. Rather “learning together” is the goal of this phase. This involves developing a shared understanding of the issue, the network of relationships between members of the system, the interdependencies that connect them, and the larger context that affects them all. Learning involves discerning the root causes, assumptions, linkages, interdependence and complexity of the network.

Once issues of purpose, membership, and process have been sufficiently addressed, the work of the stakeholder network is to develop shared understanding and to learn together about the system itself, its members, and the context that affects it. The process of collective learning is non-linear. Stakeholder groups will move through various relevant questions organically, though generally a certain logical pattern often suggests itself, as outlined below, which we label here as related to discovery and dialogue.

### Discovery Questions

- What is the history of this issue (people, places, living things)?
- What do we know about the issue, problem (“mess”), or opportunity that brings us together?
- How does it affect people, places and living things?
- How are they connected in this system around this issue?
- What visible external factors, events or potential developments concern the well-being of this network now or in the future?
- What is working and not working in the current situation?
- What do we expect will happen if things stay the same?
- What other scenarios are possible?

### **Dialogue Questions**

- How can we make visible the whole system dynamic?
- What hidden or invisible rules, structures, conditions, systemic forces and pressures create the symptoms we see in the current reality?
- What deeper root causes, patterns or assumptions underlie this issue, system, or conflict?
- What are the leverage points for change and transformation?
- What shared meaning or possibilities are unfolding from the common ground and differences?

### **Discovery**

*“A level playing field of information and a common understanding of the issues informs the discretion of people so that they can make wise decisions, individually and collectively. Learning to see the world through each other’s eyes and thus sharing perspectives ensures that everyone . . . gains a more complete and consistent perspective.”<sup>26</sup>*

Most low-trust environments are characterized by minimal sharing of information, thus creating many interpretations and perceptions around the same issue by different stakeholders. Sharing information builds trust and is ultimately about sharing power.<sup>27</sup> People can only make wise decisions for the benefit of the whole when they have complete information.

An essential goal of Collective Learning is for the group as a whole to develop a common base of information, in order that all participants develop a shared understanding of the issues or problems. This can take a significant amount of time, but is vitally important. For example, around an issue as complex as that of genetically modified foods, much time would need to be devoted up front to considering what is known and not known from science, farming, ethics, health, ecology, economics, risk-assessment, and consumer needs, etc. Edward de Bono, world renowned expert in creativity, has determined that creativity requires spending as long as it takes in the exchange of neutral and objective information (what he calls the “white hat mode”), in order that the group may know ‘what we know and what we don’t know’ collectively<sup>28</sup>.

### **Debate**

*“Out beyond ideas of right-doing and wrong-doing there is a field. I’ll meet you there.” Rumi*

Debate is a reactive, single-loop form of learning that does not contribute much to collective understanding beyond helping to clarify and confirm initial stakeholders views. Rather than open understanding to new insights, debate reinforces pre-established mental models and habitual

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<sup>26</sup> Dannemiller Tyson Associates, Whole Scale Change: Unleashing the Magic in Organizations, Berrett-Koehler Publishers, 2000, p. 176.

<sup>27</sup> Richard H. Axelrod, Terms of Engagement: Changing the Way We Change Organizations, Berrett-Koehler Publishers, 2000.

<sup>28</sup> Edward de Bono, Six Thinking Hats, 1999 MICA Management Resources, Inc.

positions. Though firmly entrenched in our culture, debate does not actually support constructive collective conversations and learning.

Learning actually happens when new mental models are formulated based on new information and insight, or when prior knowledge, attitudes, and values are revised in the light of new understanding. Rather than promote collective learning, debate more often than not leads people to become even more entrenched in their positions and 'noble certainties'. Debate usually polarizes differing points of view by emphasizing differences between stakeholders, and by looking for ways to discredit, critique and dismiss the credibility, legitimacy, and soundness of other perspectives. The assumption underlying debate is that there is only one right answer, and "we" have it. The goal is to win by being proven right and the other wrong, regardless of what may be sacrificed in the process such as goodwill and relationships.

At the heart of most debates is an underlying fear. When stakeholders perceive a threat to their identity, purpose, dignity or security, fear will drive them to find allies and create a united front to strengthen their position. Arguments are sifted down to only those basic statements of rhetoric where allies do see eye to eye, choosing in the process to ignore or minimize points of contention and disagreement with their 'comrades in arms'. This whittling down of arguments removes complexity and subtlety from stakeholders' positions, who may in fact hold a variety of conflicting views, uncertainties or be unaligned with certain aspects of their approach, behaviour or platform. Opinions can easily become polarized especially if media are involved leading to chronic conflict and 'tired' arguments. Soon, positions and views are cast in stereotyped and narrow ways that can be easily dismissed or denigrated by those with opposing views as morally or logically flawed, uncaring, stubborn or simplistic.

Debate reduces the likelihood of stakeholders engaging in subtle, complex and in-depth exchanges that might lead to new insight and possibility. The more public the debate, say with media cameras and microphones recording the proceedings, the more stakeholders are likely to present their views in absolute terms, offering bullet-proofed arguments in 'sound byte' statements that offer little room for uncertainty. An intervener's oratory, self-assurance, and physical demeanour can carry much weight in making convincing arguments to the detriment of stakeholders with less presence and language skill. In fact, when playing to the media, the more emotional, indignant or confident the speaker, the more public air time that stakeholder is likely to receive. Public consultations are prone to this type of manipulation.

*"Divisive public issues are generally debated in the media by highly visible spokespeople representing opposing perspectives. When these debates are polarized, they bring to the public an extremely limited discourse on the issue, one filled with slogans, derision, blame, and charges of misinformation (some of which are well-founded). Such discourse is not conducive to creative problem solving, nor does it promote the education and involvement of interested citizens."<sup>29</sup>*

Constructive conversations require genuine questions to be asked and answered in an environment of active and respectful listening. Genuine questions are those for which group members and stakeholders do not have a ready answer. When in a debate mode, stakeholders

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<sup>29</sup> Margaret Herzig, "Moving from Polarized Polemic to Constructive Conversation", *Interact: The Journal of Public Participation* (July, 2001).

will shy away from such productive inquiry that would shed light on why different perspectives are held, fearing that new information might be unearthed to invalidate their position. They will not show weakness in their argument by conceding some area of ambiguity, even though this might lead to a breakthrough in understanding. Fear that the media might label them as wishy-washy, or their own constituencies as defectors from their cause will inhibit stakeholders in a debate from revealing what they truly think, feel and hope for.

### Reflective & Generative Dialogue

*“How do we learn together? How do we innovate together despite the fact that occasionally we hate each other and we can’t get along?” Linda Coady, VP, Weyerhaeuser*

Reflective and generative dialogue is an alternative to debate. Dialogue is a way for stakeholders to deepen inquiry into the underlying causes, rules, and assumptions in order to get to deeper root issues, and hopefully be able to frame old problems in new ways. In the initial meetings of stakeholder networks, members will tend to be polite even if conflicted, and stick to expected, often predictable sharing of information, opinions and views. At some point, however, the stakeholder network will encounter some fundamental difference in perceptions, beliefs or assumptions between members. William Isaacs<sup>30</sup> describes this as a fundamental choice point - one of either choosing to debate and defend against perceived attack of one’s truth or of going deeper instead. If the choice is made to go deeper (this is where time spent a priori on norms and process agreements pays off; see *Dialogue Guidelines* further below), the stakeholder network will enter into reflective dialogue.

The collective wisdom and intelligence of a stakeholder network will show up in conversations that are big enough to disturb habitual thinking and invite members to hold with divergent, incongruent, and opposing views. Through the act of *presencing* (coined by Otto Scharmer and his colleagues in Theory U) that comes from deep listening and the willingness to set aside identity, control and status, a group can open to new sense-making and allow novel future possibilities to emerge. This conversational stage is called generative dialogue. First, it requires a “letting go” of what is known. Then while still holding with paradoxical and conflicting views, it involves engaging in a creative act of ‘letting come’ a vision of a different, and higher future which reconciles differences and serves the whole.<sup>31</sup> The prize when a group dares to go deeper, is the capacity for new insights, meaning and unprecedented possibilities to emerge from which innovation can occur.

*“It is facilitated when people are fulfilling the need to have their voices heard and to belong to a community or society in which they believe. It starts with the existing perspectives and the individual truth that each person brings with them. It moves beyond that to a collective knowing – to a new ordering of the old and new wisdom that comes from within and from outside the community. It expands what people know as individuals into a common database of what people know collectively. This knowing becomes the basis for their collective wisdom. What people know as a whole becomes their new truth. Generativity starts with each person’s yearnings and moves toward an image, a concept that serves to unite the yearnings of many diverse people and which has a universal appeal to it.*

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<sup>30</sup> Isaacs, William.N. (1993) 'Taking Flight: Dialogue, Collective Thinking, and Organizational Learning', *Organizational Dynamics*: 24-39, and Dialogue, The Art of Thinking Together.

<sup>31</sup> *Presence: ibid, page 11.*

*Such an image appeals to the hearts as well as the minds of people. It is out of this Generativity that new paths are forged which serve to integrate planning and action, policy and implementation.”<sup>32</sup>*

Dialogue allows individuals through such conversations to attune their values with those of others. Individuals in the dialogue are able to perceive more fully the larger whole and their connection to it. Genuine exchanges and inquiry build trust, by helping to construct shared meanings that allow people to understand each other. They help develop new insights and knowledge, and the commitment that will enable them to work together effectively to tackle complex problems.<sup>33</sup>

As stakeholder networks move to the deeper levels of dialogue during Collective Learning, they become more adept at discerning areas of agreement. A process of inquiry, of exploring assumptions, root causes and systemic linkages is central to this stage. However, to get to a new and deeper level of understanding, participants must be willing to take risks and let go of their ‘noble assumptions’. Reflecting on her experience in the Clayoquot and the Great Bear Rainforest conflicts, former Weyerhaeuser VP Linda Coady offers these learnings:

*“The conditions for collaborative learning are many. First, there must be willingness by the parties to develop new options rather than continue to fight around old ones. Secondly, there has to be a willingness to take responsibility for solving problems rather than defending or advancing positions. Third, there has to be a willingness to let go of certainty. Doing so is very hard for any big organization to do, but it is also not something that NGO’s do easily, and I can assure you it is not something that government does easily either! The willingness to accept new accountability and take new risks is absolutely key. Another condition for learning is that the change pathways have to be very visible and inclusive. If it looks like you’re reverting back to the win-lose model, you’ll have real difficulty staying in collaborative inquiry and learning.”*

Many of the key principles and practices that have been shown to facilitate group wisdom and effectiveness apply to Collective Learning.

### **Conversational Practices**

William Isaacs suggests dialogue is characterized by four conversational practices: “*voicing* - speaking the truth of one's own perspective; *listening* - without resistance; *respecting* - demonstrating awareness of the impossibility of fully understanding others' positions; and *suspending* - letting go of assumptions, judgments, certainty.”<sup>34</sup> Reflective dialogue creates a different field of interaction than debate, one where members of the stakeholder network can begin to appreciate how and why others may hold very differing ideas and views. From such reflective conversation, a more wholistic view can begin to emerge, where a larger truth is seen to lie somewhere between, or beyond, opposing points of view. Frequently, it is precisely in the reconciliation of opposing arguments that a more complete and accurate comprehension of reality emerges from which higher quality, more sustainable solutions can be wrought.

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<sup>32</sup> *Whole Scale Change: Unleashing the Magic in Organizations*, ed. cit., quote by Barry Camson, p. 184.

<sup>33</sup> Calton and Payne (199 ), Swanson (1999) – Ann has references?

<sup>34</sup> Isaacs as quoted in “Dialogic Approaches to Global Challenges: Moving from “Dialogue Fatigue” to Dialogic Change Processes”, A Working Paper, August 2005, Prepared for the Generative Dialogue Project, by Bettye Pruitt and Steve Waddell, pps 9-10.

## Dialogue Guidelines

While 'dialogue' is a generic term in broad usage referring to the process of listening to learn and understand, the "technology" of dialogue<sup>35</sup> is used to refer to the skills and guidelines that support the practice of dialogue.

### *Listening Deeply*

There are three levels of listening in dialogue: the level of the *self* – attending to one's personal internal conversation; the level of the *others* – the contributions made by others including a willingness to be influenced or changed by this; and the field of the *whole* - the pattern of new meaning that arises from the individual and collective levels. Listening deeply involves noticing the assumptions we are hearing in others, and those we ourselves are making. When we listen deeply to different views and beliefs with a view to integrating or synthesizing these to what we already know, our own perspective is expanded and new learning happens. Guidelines that support active listening include:<sup>36</sup>

- Listen from a place of learning and new understanding rather than confirmation of current thinking.
- Be open and curious about other perspectives.
- Inquire into the views of others by asking genuine questions both to discover root causes and areas of agreement.

Henry Klassen, Chair of the Nechako Watershed Council emphasizes the importance of listening to understand: *"Many times, folks with good ideas can be dismissed or discredited through political or personal attack. The watershed issue is very deep and old, with generations having built on each other's sense of loss and persecution. If a person making a presentation expresses themselves in heated terms, we strive to listen deeply to what that person is feeling and to the issues beneath. We may ask that person to restate and redeliver their message, and to sort out what they really want to say and have understood. It is important for Council members not to get hooked or participate at the level at which the message is initially delivered."*

*"To their everlasting credit", says Linda Coady, "the First Nations in Clayoquot brought our company and the environmental groups together, and said in essence, 'Get your act together and find some solution that we can all live with.' Thus began a long, difficult journey together in which both MB and the environmental groups were like two convicts who escape from a chain gang manacled together. Like it or not, we had to work out a solution both could live with. As time went by, whether we wanted to or not, the people on both sides got to know each other better. (Going to several hundred meetings will do that to you!) Consequently, much of the theatre and some of the bitterness fell by the wayside.*

*It is important for room to be created where people can think differently about the issues. As companies, we had to create a safe place where we could go to examine alternatives to the status quo. Getting the license to do this within our own organizations was hard enough, let alone doing so with groups with whom we were in a highly adversarial conflict. A conflict free period is very necessary, but the Catch-22 is that resolving the conflict cannot be a precondition to creating the conflict free period."*<sup>37</sup>

<sup>35</sup> Glenna Gerard and Linda Terfs, Dialogue: Rediscover the Transforming Power of Conversation, John Wiley & Sons, Inc., 1998, Part II, pages 57-154.

<sup>36</sup> Adapted from Gerard and Ellinor, ed. cit. Part II.

<sup>37</sup> Linda Coady, Keynote presentation, New Terms of Engagement II, 2002

### **Slowing Down the Pace of Conversation**

Double-loop and triple-loop learning require going beyond presenting symptoms and what is already known to explore one's reasoning, assumptions and beliefs. This process of reflection takes longer than is allowed for in a normal pace of discussion or debate. Pauses and silence are encouraged in dialogue to enable stakeholders the time they need to inquire more deeply into root causes and assumptions, including their own reactions and beliefs.

Group members are encouraged to speak one at a time without interruption and to the whole group, rather than engaging in one-on-one exchanges. This practice fosters an atmosphere of respectful and attentive listening rather than debate, and helps participants depersonalize contributions by speaking to the essence of their concern, need or opinion. The opportunity to speak without interruption helps people feel heard and acknowledged. Knowing that each person will have a turn to speak fully also assists those listening to be more fully attentive, rather than planning their immediate intervention or rebuttal as would happen in a debate.

### **Authentic Communication**

The goal of dialogue is to get beneath the layers of presenting rhetoric, slogans or facile arguments that often characterize debate, to a deeper consideration of the deeper values, fears, hopes and concerns from which they arise. In dialogue, group members from the organization or community are encouraged to speak only for themselves, and to reveal the full complexity of their views. Inviting people to speak about what matters most to them and how they have come to formulate their views from observation, research and lived experience creates a space for richer, more authentic and richer communication.<sup>38</sup> Other related dialogue guidelines:<sup>39</sup>

- Speak from the heart about what matters to you. (*Here's how this affects me/our organization personally...*)
- Speak only for yourself, and avoid making attributions about others' intentions, beliefs or values.
- Hold stories or personal material in confidentiality appropriate to the setting and permission of group participants.

### **Suspending**

*"Suspension means that we neither suppress what we think nor advocate it with unilateral conviction. Rather, we display our thinking in a way that lets us and others see and understand it."<sup>40</sup>*

Dialogue invites stakeholders to suspend their certainty about what they know, so that they may truly hear and understand a divergent point of view. Understanding another person's perspective does not signify our agreement with or acceptance of it. A key assumption is that all stakeholders including us are in fact missing some vital information, but acting from integrity. This mindset is nicely captured by the question: "*why would people of intelligence and good will see this differently?*" Other dialogue guidelines<sup>41</sup> include:

- Treat all as peers, suspending any differences in status and power.

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<sup>38</sup> Inspired by Margaret Hertz, ed. cit.

<sup>39</sup> Adapted from Gerard and Ellinor, ed. cit. Part II.

<sup>40</sup> William Isaacs, ed. cit., pps. 134-5.

<sup>41</sup> Adapted from Gerard and Ellinor, ed. cit. Part II.

- Suspend your assumptions and certainties, and hold them up for examination.
- Agree to delay deliberation and decision until all voices and perspectives have been heard.

### **Inquiry**

*“Inquiry is about asking questions and holding an attitude of curiosity, opening the door for new insights. Reflection is about holding the door open long enough for new perceptions to emerge.”<sup>42</sup>*

When diverse people come together from different parts of an organization or community, each person brings with them the purpose, history, vocabulary, knowledge base, and values of their distinct work unit or social network. Taken together, these create an identity and coherence, and also represent the self-referencing lens or mental models through which its members view the world. Though mostly invisible and uncontested (accepted as truth), such worldviews are powerful in shaping the data each person will focus on, how they will interpret it, and what meaning and beliefs they will draw from it.<sup>43</sup> During dialogue, the process of inquiry is an invitation to become aware of one’s own thinking and make it visible to others, as well as to solicit the same from others. Some dialogue guidelines here include:

- Risk sharing your own views, values, interpretations, reasoning, and assumptions. *(Here’s what I/we think, and how I/we got there. I/we came to this conclusion based on... I/we assumed that...)*
- Inquire into the reasoning and thinking of others. *(Do you see this differently? Help us understand your interpretation. How did you get from this data to those conclusions?)*
- Notice and share the patterns, insights, metaphors, images, new meaning, and common ground that are emerging within you and within the group
- Deepen reflection and inquiry by asking a powerful open-ended question or inviting a pause.

### **Storytelling**

Among the many processes that may be effectively used during Collective Learning are storytelling and honouring of past history. When people share their stories, they share their history and traditions through their authentic voice. They speak genuinely of the things that are important to them, of how they perceive past actions, of their present fears and concerns. Stories create links that connect people to one another as human beings, and to the larger whole of which they are a part. Storytelling helps to alter our perceptions of events and circumstances and to understand them from different points of views.

A graphic mapping of past events as stories are told can help the stakeholder network validate its elders, acknowledge past grievances, and discover previously unknown cause-effect relationships. By looking back to its history, the network can identify those things it wishes to conserve into the future.

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<sup>42</sup> Glenna Gerard and Linda Ellinor, ed. cit. page 111.

<sup>43</sup> Peter Senge, Art Kleiner, charlotte Roberts, Richard Boss and Bryan Smith, *The Fifth Discipline Fieldbook: Strategies and Tools For Building a Learning Organization*, Currency Doubleday, 1994, pages 263.

*“In the telling of what is true for them, in the sharing of what is most deeply authentic, there begins a kind of softening and release – a collective sigh of recognition that though stories are very different, the feelings are the same. This sharing of experience begins to remove many of the obstacles to collective forward movement.”<sup>44</sup>*

Storytelling is the most ancient form that human beings have developed for passing on their wisdom and knowing. Storytelling is also a way of honouring the past. A graphic mapping of past events can help the system validate its elders and history, acknowledge past grievances, and discover previously unknown cause-effect relationships. By looking back to its history, the system can identify those things it wishes to conserve into the future.

In various meetings with community groups, Deborah Eastlick of the Alberta Energy Utilities Board has found storytelling to be a humanizing and effective way for people to connect.

*“Storytelling is the one thing that I do all the time in stakeholder meetings. ‘Tell me your concerns from your perspective, your land, your family and what you hold dear.’ ‘Tell me the story of who you are and why this is important to you.’ Storytelling connects people at the heart at a real level. When people tell their story from a personal level, then others can relate emotionally, and this creates a different type of meeting. We then discover that we have many things in common such as family and values that other participants can relate to. Be prepared though, when you begin, for the emotional manifestations of the stories to be expressed, not in order to be fixed, but as part of the reality and truth of that person’s perspective. Storytelling may sound like a dicey thing, but it is by far the fastest route to really get to the issues. And when you do, often you discover that it is not at all what people think, but simply that nobody has ever asked them for their story.” Deborah Eastlick, AEUB<sup>19</sup>*

### **Holding Space**

In the research reported in *Centered on the Edge, Mapping the Field of Collective Intelligence and Spiritual Wisdom*<sup>45</sup>, “holding the space” refers to a deliberate and consistent holding of a fundamental intention for unity and inclusiveness. Without such a conscious intent, the sense of urgency for progress and resolution of the conflict push groups to rush through discovery and dialogue and deliberate prematurely about solutions. However, when people do not feel heard, they often become defended or entrenched in their positions, and will certainly cycle back time and again to make their point. In Collective Learning, we have seen that it is important to make haste slowly!

*“Holding the space” is beginning with an intention or belief for a high outcome. It is a personal practice and a genuine belief that the conversations where people share their values are sacred conversations. It is an intentional space of profound respect that I believe is communicated at some level, even when others may be really angry.” Deborah Eastlick, AEUB*

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<sup>44</sup> *Centered on the Edge*, ed. cit., p. 23.

<sup>45</sup> *Centered On the Edge: Mapping the Field of Collective Intelligence and Spiritual Wisdom*, Fetzer Institute, Kalamazoo Michigan, 2001

*“A lot of patience is required to hold with the issue for as long as needed, to not fill in the blanks when there’s lots of emotion, and to give someone the time they need to formulate their ideas. Holding the space for people is about allowing people the time, respect and opportunity to express themselves in their own way. A lot of good things have come out of statements; ‘I have a feeling that this is useful, but I don’t know exactly how’. The old way was not to give feelings much value, and to insist on something “solid” and “saleable”. We learned over time to trust our intuition, and to listen or state that ‘something doesn’t feel right’. Now when somebody says something like this, we put the feeling on the flipchart. This accords respect for the person who has spoken, and then together, we try to nail down the “why”.* Henri Klassen

## CO-CREATIVE ENGAGEMENT METHODS

*“The need is for better processes that result in broadly owned, sustainable changes that address the challenge of complexity, meaning, innovation, deliberation and results.”*

(Democratic Dialogue: A Handbook for Practitioners, Dr. Bettye Pruitt and Philip Thomas, 2007)

*“What’s needed for effective, sustainable change are sessions in which people collectively explore each other’s assumptions, seek and expand common ground, shape a desired future, and jointly take ownership of the solutions to the issues at hand.”* (Change Handbook, pps. 2-3)

Through conversation, says William Isaacs, professor at MIT’s Sloan School of Management, human beings create, refine and share knowledge<sup>46</sup>. Co-creative engagement methods help people consciously re-weave the fabric of community through respectful, mindful and inclusive conversations. Many different conversational group processes, methods, and practices are good for this. Some help stimulate understanding and respect. Others focus on transforming and reframing conflict into productive differences and understanding it as part of humanity’s ‘differentiated wholeness’<sup>47</sup>. Still others allow people to decide upon a course of action together by generating and evaluating options. And finally, some approaches foster collaborative action and new forms of governance.

When a community or organizational group is initially convened around an issue, it may do so for a variety of reasons. These may be broadly categorized into the following sets of purposes<sup>48</sup>.

- *Awareness* – exploring issues to increase awareness and understanding
- *Relationship-Building* – transforming or reframing conflict and building relations
- *Decide Together* – generating and evaluating the merits of different options/solutions
- *Work Together* - collaborative multi-stakeholder action and whole-system change.

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<sup>46</sup> William Isaacs, Dialogic Leadership, The Systems Thinker, V.10, #1, 1999

<sup>47</sup> Peggy Holman, Tom Devane, Steven Cady, The Change Handbook: The Definitive Resource on Today’s Best Methods for Engaging Whole Systems, 2<sup>nd</sup> Ed. , Berrett-Koehler Publishers, 2007

<sup>48</sup> This categorization is derived from the model of the National Coalition for Dialogue and Deliberation and Sandy Heierbacher in particular ([www.thataway.org](http://www.thataway.org)) and the Democratic Dialogue Handbook earlier cited.

Often, the initial reason for bringing a group together changes over time, and different methods are appropriate to address desired outcomes and purposes. In each of these purposes, the group that is convened must be increasingly representative of all the voices in the system to be effective.

Dialogue is both an over-arching *stance*: the intent to learn and understand, and a *practice* for conversation entailing

### Co-Creative Stakeholder Engagement Different Methods for Different Purposes

<p><b>1. Awareness: Increase Understanding</b></p> <ul style="list-style-type: none"> <li>• World Café</li> <li>• Scenario Planning</li> <li>• Storytelling</li> <li>• Circle Conversations</li> <li>• Philosophers' Café</li> </ul>	<p><b>2. Relationship Building - Reframe Conflict &amp; Build Relationship</b></p> <ul style="list-style-type: none"> <li>• Dialogue</li> <li>• PeaceMaking Circles</li> <li>• Search for Common Ground</li> <li>• Sustained Dialogue</li> <li>• National Issues Forum</li> </ul>
<p><b>3. Decide Together: Generate &amp; Evaluate Solutions</b></p> <ul style="list-style-type: none"> <li>• Deliberative Dialogue</li> <li>• 21<sup>st</sup> Century Town Hall Meeting</li> <li>• Deliberative Polling</li> <li>• Design Charettes</li> <li>• Citizen Juries, Panels, Assemblies</li> </ul>	<p><b>4. Work Together – Collaborate on Multi-Stakeholder Action/Change</b></p> <ul style="list-style-type: none"> <li>• Future Search</li> <li>• Appreciative Inquiry</li> <li>• Study Circles</li> <li>• Open Space</li> <li>• Whole Scale Change</li> </ul>

guidelines such as those just reviewed like through deep listening, mutual inquiry, suspension, slowing down, and authentic and respectful communication.

The methods and processes where dialogue as a stance and a practice have been adopted as the preferred learning mode have greatly proliferated over the past twenty plus years. Notable amongst

Source: Adapted from National Coalition on Dialogue and Deliberation 'streams', [www.thataway.org](http://www.thataway.org).

these are methods such as Future Search, Open Space, World Café, PeerSpirit Circle, Appreciative Inquiry, Whole Scale Change, Peace-Making Circles, Study Circles; Large Scale Forums; Citizen or Constituent Assemblies Panels or Juries; 21<sup>st</sup> Century Town Hall Meetings; Public Conversation Projects; Charrettes, Conversation Cafes, Wisdom Councils, Real Time Strategic Change, and the like<sup>49</sup>.

All of these dynamic processes go beyond telling, listening, and negotiating, to actively involving and engaging stakeholders in collective learning, and as appropriate, planning and whole system change. A flavour is provided of some of these powerful methods in the Appendix that follows, along with additional reference and resource information.

<sup>49</sup> The website of the National Coalition on Dialogue and Deliberation is an excellent resource on these new stakeholder engagement methodologies, tools and processes; see [www.thataway.org](http://www.thataway.org).

## APPENDIX

### Future Search<sup>50</sup>

A future search is a large group meeting that helps a group of diverse stakeholders transform their capability for action very quickly. The 2 to 3 day meeting is task-focused, bringing together in one room (or hundreds in parallel rooms) some 60 to 80 people representing different stakeholder groups around the same conversation. Special attention is paid to ensure that those with resources, expertise, formal authority and need are present. They share leadership and participate as peers. Through dialogue they confirm their mutual values, tell stories about their past, present and desired future, and discover their common ground. Only then do they make concrete action plans. The Future Search design comes from theories and principles tested in many cultures for the past 50 years. It relies on mutual learning among stakeholders as a catalyst for voluntary action and follow-up. People devise new forms of cooperation that continue for months or years.

Future Search derives from well-researched theories<sup>51</sup> on the conditions under which diverse groups will cooperate:

- Get the "whole system" in the room. Invite a significant cross-section of all parties with a stake in the outcome.
- Explore the "whole elephant" before seeking to fix any part. Get everyone talking about the same world. Think globally, act locally.
- Put common ground and future focus front and center while treating problems and conflicts as information, not action items.
- Encourage self-management and responsibility for action by participants before, during, and after the future search
- Urge full attendance - Keep part-time participants to a minimum.
- Meet under healthy conditions - This means airy rooms with windows, healthy snacks and meals, adequate breaks.
- Work across three days (sleep twice) - People need "soak time" to take in everything that happens.

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<sup>50</sup> The information in this section has been extracted (ML to get permission) from the Future Search website at [www.futuresearch.net](http://www.futuresearch.net), and from Marvin Weisbord and Sandra Janoff's, *Future Search: An Action Guide to Finding Common Ground in Organizations & Communities*, Berrett-Koehler Publishers, Inc., 1995.

<sup>51</sup> Theories on which Future Search is founded: 1) From very successful large-scale community futures conferences by held in 88 cities, states and counties in North America during the 1970's, Future Search stresses the importance of getting the whole system in the room to focus on the future, rather than on problems and conflicts (Ronald Lippitt's and Eva Schindler-Rainman, 1980); 2) From social science research (Eric Trist; Fred Emery, Solomon Asch) , Future Search seeks to create the conditions for effective dialogue where people can accept each other's reality, by talking about the same world from the same set of psychological needs (food, shelter, security, and meaning). People are also responsible for managing their own planning rather than letting others do it for them. 3) From social psychology (Kurt Lewin - G.W. Lewin, ed. 1948)., a commitment to democratic ideals and their embodiment in the action research tradition.

- Ask for voluntary public commitments to specific next steps before people leave.

### World Café<sup>52</sup>

The World Café is designed to intentionally harness the power of conversation for business and social value. This easily-applied process focused collective attention by asking questions that matter to a group and that attract collaborative engagement. Café is built on the assumption that people already have accessible within them the knowledge, wisdom and creativity to confront even the most difficult challenges. The methodology is designed primarily to generate collective knowledge-sharing, webs of interpersonal relationships, and new possibilities for action. A Café sets the stage for more traditional forms of action planning. Collective insight evolves from conversations that honour unique contributions; connect ideas; and from listening to the middle for emerging patterns, and noticing deeper themes and questions. Collective intelligence emerges as the system connects to itself in diverse and creative ways. Compelling questions encourage collective learning. Human systems such as families, organizations, communities are understood from the perspective of networks - the underlying pattern of living systems.

### Seven Guiding Principles<sup>53</sup>

The key to creating a successful World Café conversation is employing the seven guiding principles, which *when used in combination* foster courageous conversations and collective intelligence.

1. *Set the context* - Clarify the purpose and parameters of the conversation and its place in the larger environment in which it will happen.
2. *Create hospitable space* - Provide a welcoming, safe, life-serving environment.
3. *Explore questions that matter* - Invite collective attention into what's important to the participants.
4. *Encourage everyone's contribution* - Engage meaningful participation by each person, with real respect.
5. *Cross-pollinate and connect diverse perspectives* - Facilitate juicy diversity and equally juicy interconnectedness.
6. *Listen together for patterns, insights, and deeper questions* - Help coherent group insight emerge naturally from the dance of individual perspectives and passions.
7. *Harvest and share collective discoveries* - Make the group's collective intelligence visible to itself.

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<sup>52</sup> Source: Summarized from Juanita Brown with David Isaacs and the World Café Community, *The World Café: Shaping Our Futures Through Conversations That Matter*, Berrett-Koehler Publishers, Inc., 2005

<sup>53</sup> Summarized from The World Café website, at <http://theworldcafe.com/knowhow.html>.

## Open Space<sup>54</sup>

Open Space Technology, created in the mid-1990's, represents one of the most democratic method for initiating large-scale discussion and activity around a common issue. Suitable for meetings of from five to thousands of participants, and lasting anywhere from one to 3 days, Open Space, like World Café above, can be used effectively by virtually anybody. "Open Space conferences", says Tom Atlee of The Co-Intelligence Institute, "are particularly effective when a large, complex operation needs to be thoroughly re-conceptualized and re-organized -- when the task is just too big and complicated to be sorted out from the top. On the assumption that such a system contains within it the seeds of everything that needs to happen with it, Open Space provides it with an opportunity to self-organize into its new configuration. For this to work, however, the system's leaders must let go of control so that true self-organization can take place."<sup>55</sup>

In the first hour of the meeting, participants themselves create their own agenda, including when and where conversations will be convened. There are no keynote speakers, no pre-announced schedules of workshops, no panel discussions, no organizational booths. The entire process proceeds through self-organization, where people are motivated by their own passion and interest, and guided by responsibility to the whole. Shorter meetings are useful to open up conversation and probe issues; longer meetings enable action planning to occur, based on the shared understanding and commitment that has emerged.

### Key Principles & Laws:

- Whoever comes (to the conversation) is the right people.
- Whatever happens is the only thing that could have.
- Whenever it starts is the right time.
- When it is over it is over.
- The Law of Two Feet: "If you find yourself in a situation where you aren't learning or contributing, go somewhere else." This law causes some participants to flit from conversation to conversation, like bumblebees cross-pollinating workshops, while others called Butterflies, act as powerful attractors magnetizing others into serendipitous and fruitful conversations.

## PeerSpirit Circle<sup>56</sup>

The circle, or council, is an ancient form of meeting that has gathered human beings into respectful conversation for thousands of years. The circle has served as the foundation for

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<sup>54</sup> For website information on Open Space, see: <http://www.tmn.com/openspace/index.html> and <http://www.openspaceworld.org>, and read Harrison Owen, *Open Space Technology: A User's Guide*, Berrett-Koehler Publishers, Inc., 1997.

<sup>55</sup> Source: Tom Atlee, The Co-Intelligence Institute, <http://www.co-intelligence.org/P-Openspace.html>

<sup>56</sup> This description and the PeerSpirit Circle guidelines that follow have been placed freely on the world wide web as a gift by its co-founders, Christina Baldwin and Ann Linnea, who have been training facilitators in North America since 1995. In 2000-2001, through the initiative of From the Four Directions, this methodology was adapted by people in over 37 countries. For complete information on the PeerSpiritCircle methodology and practices, see: <http://www.peerspirit.com/htmlpages/circlebasicsprv.html>.

many cultures. In some areas of the world this tradition remains intact, but in other societies it has been nearly forgotten. PeerSpirit circling is a modern methodology that calls on this tradition and helps people gather in conversations that fulfill their potential for dialogue, replenishment, and wisdom-based change. PeerSpirit and From the Four Directions form a partnership dedicated to global shift through local conversation.

To start a circle, somebody needs to set an intention (content, mission, or direction), offer basic structure, and be ready to model circle skills while others become accustomed to how a circle works. This person is the caller of the circle, sometimes called the circle host. A circle may be held one time or meet many times over a period of months or years. In ongoing circles, the host role rotates so that responsibility for the group is shared among members.

### The Components of the Circle

- Welcome Start-point
- Center and Check-in/Greeting
- Agreements
- Intention
- Three Principles and Three Practices
- Guardian of process
- Check-out and Farewell

Each ongoing circle will probably want to consider their agreements and spend time phrasing them in their own words and adding agreements that suit their purpose together.

### Three Circle Principles

The circle is not a leaderless group: It is an all leader group. The circle has been called the basic unit of democracy. The structure created by components of the circle becomes a form of self-governance. Three principles referenced in PeerSpirit work serve as a foundation for this governance. These principles are:

- Leadership rotates among all circle members.
- Responsibility is shared for the quality of experience.
- People place ultimate reliance on inspiration (or spirit), rather than on any personal agenda.

### Three Circle Practice

The primary activity of circle is the interaction of speaking and listening. Three practices of council remind people of the quality of attention that council space invites:

- To speak with intention: noting what has relevance to the conversation in the moment.
- To listen with attention: respectful of the learning process all members of the group.
- To tend the well-being of the circle: remaining aware of the impact of our contributions.

### Forms of Circle Council

The circle commonly uses three forms of council: talking piece, conversation and reflection.

*Talking piece council* is often used as part of check-in, check-out, and whenever there is a

desire to slow down the conversation, collect all voices and contributions, and be able to speak without interruption.

*Conversation council* is often used to when what is needed is reaction, interaction, and an interjection of new ideas, thoughts and opinions. The energy of open conversation stimulates the free flow of ideas. However, in circle, the agreement to pause and gather thoughts can be very helpful in the midst of conversation council. Attention should be paid to pacing so that all contributions are honored.

*Reflection, or Silent council* gives each member time and space to reflect on what is occurring, or needs to occur, in the course of a meeting. Silence may be called so that each person can consider the role or impact they are having on the group, or to help the group realign with their intention, or to sit with a question until there is clarity. Depending on the setting and purpose of the circle, people may ask for a period of group silence as way to wait for guidance, take time-out from conversation, or center themselves more deeply before making a decision or taking action.

### **Appreciative Inquiry**

“Appreciative Inquiry (AI) is about search for the best in people, their organizations, and the relevant world around them. In its broadest focus, it involves systematic discovery of what gives “life” to a living system when it is most alive, most effective, and most constructively capable in economic, ecological, and human terms. AI involves, in a central way, the art and practice of asking questions that strengthen a system’s capacity to apprehend, anticipate, and heighten positive potential.” AI deliberately seeks to work from the “positive change core” and it assumes that every living system has many untapped and rich and inspiring accounts of the positive. Link the energy of this core directly to any change agenda and changes never thought possible are suddenly and democratically mobilized.<sup>57</sup>”

When an appreciative stance is brought to stakeholder interactions, positive energy is mobilized, creating the possibility that people chronically stuck in conflict and focused on problems can enter into new conversations together. Rather than focusing on the old “problem-saturated” story, participants are invited to look for, and draw out of their experiences, an asset-based, positive core that can be activated and exercised toward the goals of better understanding and bridging differences.

#### Assumptions Underlying Appreciative Inquiry

- In every community something works.
- What we focus on becomes our reality.
- Reality is created in the moment – there is more than one reality.
- The act of asking questions influences the community in some way.
- People have more confidence and comfort to journey to the future when they carry forward parts of the past.
- If we carry forward parts of the past, they should be what is best.

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<sup>57</sup> *A Positive Revolution in Change: Appreciative Inquiry* by David L. Cooperrider and Diana Whitney, from the Appreciative Inquiry Commons, <http://appreciativeinquiry.case.edu/uploads/whatisai.pdf>

## *Collective Learning for Co-Creative Engagement*

- It is important to value differences.
- The language we use creates our reality.

### 4-D Model

The Appreciative Inquiry approach is often worked out in practice by using the '4-D' model:

- *Discover*—people talk to one another, often via structured interviews, to discover the times when the organisation is at its best. These stories are told as richly as possible
- *Dream*—the dream phase is often run as a large group conference where people are encouraged to envision the organisation as if the peak moments discovered in the 'discover' phase were the norm rather than exceptional.
- *Design*—a small team is empowered to go away and design ways of creating the organisation dreamed in the conference(s).
- *Deliver*—the final phase is to implement the changes.