

# Liberating Structures

Simple, Subtle, Powerful

Engagement Tools for Meeting Facilitation



# Liberating Structures Quick Reference Guide

<p><b>1-2-4-All</b> (12 minutes) Engage everyone simultaneously in generating questions / ideas / suggestions.</p>	<p><b>15% Solutions</b> (40 minutes) Discover and focus on what each person has the freedom and resources to do now.</p>	<p><b>25/10 Crowd Sourcing</b> (35 minutes) Rapidly generate &amp; sift a group's most powerful actionable ideas.</p>
<p><b>9 Whys</b> (20 minutes) Make the purpose of your work together clear.</p>	<p><b>Agreement-Certainty Matrix</b> (45 minutes) Sort challenges into simple, complicated, and complex categories.</p>	<p><b>Appreciative Interviews</b> (60 minutes) Discover &amp; build on the root causes of success.</p>
<p><b>Celebrity Interview</b> (60 minutes) Reconnect the experience of leaders and experts with the people closest to the challenge at hand.</p>	<p><b>Conversations Café</b> (60 minutes) Engage everyone in making sense of profound challenges.</p>	<p><b>Critical Uncertainties</b> (100 minutes) Develop strategies for successfully operating in a range of plausible yet unpredictable futures.</p>
<p><b>Design Storyboards</b> (50 minutes) Define the step-by-step design elements for bringing initiatives or meetings to productive endpoints.</p>	<p><b>Discovery &amp; Action Dialogue</b> (70 minutes) Discover, spark, and unleash local solutions to chronic problems.</p>	<p><b>Drawing Together</b> (40 minutes) Reveal insights and paths forward through non-verbal expression.</p>
<p><b>Ecocycle Planning</b> (95 minutes) Analyze the full portfolio of activities &amp; relationships to identify obstacles &amp; opportunities for progress.</p>	<p><b>Generative Relationships</b> (25 minutes) Reveal and understand relationship patterns that create value or dysfunctions.</p>	<p><b>Heard, Seen, Respected</b> (33 minutes) Practice deeper listening and empathy with colleagues.</p>
<p><b>Helping Heuristics</b> (15 minutes) Practice progressive methods for helping receiving help and asking for help.</p>	<p><b>Impromptu Networking</b> (20 minutes) Rapidly share challenges and expectations while building new connections.</p>	<p><b>Improv Prototyping</b> (20 minutes) Develop effective solutions to chronic challenges while having serious fun.</p>
<p><b>Integrated Autonomy</b> (65 minutes) Move from either-or to robust both-and solutions.</p>	<p><b>Min Specs</b> (50 minutes) Specify only the absolute "Must do's" &amp; "Must not do's" for achieving a purpose.</p>	<p><b>Open Space Technology</b> (100 minutes) Liberate inherent action and leadership in large groups.</p>
<p><b>Panarchy</b> (145 minutes) Understand how embedded systems interact, evolve, influence innovation, and transform.</p>	<p><b>Purpose-to-Practice</b> (175 minutes) Define the 5 elements that are essential for a resilient &amp; enduring initiative.</p>	<p><b>Shift &amp; Share</b> (70 minutes) Spread good ideas and make informal connections with innovators.</p>
<p><b>Simple Ethnography</b> (415 minutes) Observe and record actual behaviors of users in the field.</p>	<p><b>Social Network Webbing</b> (60 minutes) Map informal connections and decide how to strengthen the network to achieve a purpose.</p>	<p><b>TRIZ</b> (35 minutes) Stop counterproductive activities &amp; behaviors to make space for innovation.</p>
<p><b>Troika Consulting</b> (31 minutes) Get practical and imaginative Help from colleagues immediately.</p>	<p><b>User Experience Fishbowl</b> (60 minutes) Share know-how gained from experience with a larger community.</p>	<p><b>What I Need from You</b> (70 minutes) Surface most essential needs across functions and accept or reject requests for support.</p>
<p><b>What, So What, Now What?</b> (45 minutes) Together, look back on progress to-date and decide what adjustments are needed.</p>	<p><b>Wicked Questions</b> (25 minutes) Articulate the paradoxical challenges that a group must confront to succeed.</p>	<p><b>Wise Crowds</b> (15 minutes) Tap the wisdom of the whole group in rapid cycles.</p>

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# Introduction

The exercises contained in this guide are excerpts from *The Surprising Power of Liberating Structures: Simple Rules to Unleash A Culture of Innovation* by Henri Lipmanowicz and Keith McCandless. If you find this guide helpful, then we highly recommend that you purchase the full text, which goes into much greater detail on the power of these structures. ([www.libertingstructures.com](http://www.libertingstructures.com))

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Liberating Structures (LS) are novel and practical how-to methods to help include and unleash everyone in shaping next steps. They distribute control so that participants can shape direction themselves as the action unfolds. They also make it easy for leaders of all levels to create conditions for people to work at the top of their ability and creativity. In this environment, people thrive and enjoy their work, creating a successful path to top performance.

LS are designed to be easy to use so that everybody can master them. This makes it possible for change to emerge from within instead of being compelled from the top. Change leaders know that they would greatly increase productivity and innovation if only they could get everyone fully engaged.

With LS, it is easy to learn small alterations in the way we meet, plan, decide and relate to one another. No lengthy training courses or special skills are required; mastery is simply a matter of practice.

The central idea behind Liberating Structures is the power of including and unleashing everyone.

Liberating Structures create space for all contributions to emerge and be taken into consideration. Because LS are easy to use, including everyone can become a routine practice that invites people to participate and contribute on a daily basis. When this is the case, “inclusive leadership” can become the norm. This inevitably reveals hidden leaders - those whose voices would otherwise never be heard. These new leaders are the source of fresh ideas and new connections and they strengthen the organization while inspiring other new leaders to emerge.

Inclusive leadership leads to increased innovation by allowing all voices to be heard, and by constantly creating an opportunity for creative conversations to emerge spontaneously. It creates ideal conditions for more collaboration as well as the emergence of more innovation. By creating simple rules to guide and encourage everyone’s contributions, LS generate the freedom that arises from shared understanding of simple rules.

Liberating Structures stimulate inventiveness by minimally structuring the way we interact while liberating content or subject matter. Very simple constraints unleash creative adaptability, generating better than expected results. Individual brilliance and collective wisdom are unbridled.

Many LS are perfectly designed to inspire innovation and enhance improvement. The following Liberating Structures are particularly powerful in getting you started: 1-2-4-All, Improv Prototyping, Simple Ethnography, 25/10 Crowdsourcing, 15% Solutions, Shift-and-Share, and TRIZ.

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# 1-2-4-All

(12 minutes)



## Engage Everyone Simultaneously in Generating Questions, Ideas, and Suggestions

You can immediately include everyone regardless of how large the group is. You can generate better ideas and more of them faster than ever before. You can tap the know-how and imagination that is distributed widely in places not known in advance. Open, generative conversation unfolds. Ideas and solutions are sifted in rapid fashion. Most importantly, participants own the ideas, so follow-up and implementation is simplified. No buy-in strategies needed! Simple and elegant.

This process is a great way to get into a rich conversation with small groups. Give participants a short amount of time to reflect on a question or issue. Some may want to jot down a few notes. Others may want to close their eyes. Ask for silence during this time so that individuals really have time and space to get their own thoughts together. Then ask participants to find one other person and share their ideas for 2 minutes. You can invite them to talk to the person next to them or, if you'd like them to move around and mix it up a bit more, ask them to stand up and find a partner. Once that's done, invite each of the pairs to join up with another pair to make a foursome. Suggest they each first share interesting things they heard or said in the previous rounds. Then continue with the conversation as a group. Finally, invite everyone back to the whole group. Ask an open question such as "What insights emerged from your conversation?" or "How has your understanding/view of the issue changed?"

Ask a question in response to the presentation of an issue, or about a problem to resolve or a proposal put forward (e.g., What opportunities do YOU see for making progress on this challenge? How would you handle this situation? What ideas or actions do you recommend?). Participants should sit in pairs facing each other, then in groups of four.

1 minute	Silent self-reflection by individuals on a shared challenge, framed as a question.
2 minutes	Generate ideas in pairs, building on ideas from self-reflection.
4 minutes	Share and develop ideas from your pair in foursomes (notice similarities and differences).
5 minutes	Ask, "What is one idea that stood out in your conversation?" Each group shares one important idea with all.

1-2-4-All Notes:

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# 15% Solutions

(40 minutes)



## Discover and Focus on What Each Person Has the Freedom and Resources to Do Now

You can reveal the actions, however small, that everyone can do immediately. At a minimum, these will create momentum, and that may make a BIG difference. 15% Solutions show that there is no reason to wait around, feel powerless, or fearful. They help people pick it up a level. They get individuals and the group to focus on what is within their discretion instead of what they cannot change. With a very simple question, you can flip the conversation to what can be done and find solutions to big problems that are often distributed widely in places not known in advance. Shifting a few grains of sand may trigger a landslide and change the whole landscape.

Most people have about 15% control over their work situations. The other 85% rests in the broader context, shaped by the general structures, systems, events, and culture in which they operate. In connection with their personal challenge or their group's challenge, ask, "What is your 15 percent? Where do you have discretion and freedom to act? What can you do without more resources or authority?" Then each person generates his or her own list of 15% Solutions. After that, they will share their ideas with the group. Each person will have 4 minutes to speak and they should go one person at a time. Finally, group members provide a consultation to one another for 5 minutes, asking clarifying questions and offering advice. This also will be one person at a time.

In connection with their personal challenge or their group's challenge, ask, "What is your 15 percent? Where do you have discretion and freedom to act? What can you do without more resources or authority?" Arrange participants into groups of four.

4 minutes	First alone, each person generates his or her own list of 15% Solutions.
16 minutes	Individuals share their ideas with the group. 4 minutes per person and one person at a time.
20 minutes	Group members provide a consultation to one another (asking clarifying questions and offering advice). 5 minutes per person and one person at a time.

15% Solutions Notes:

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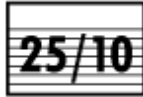
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# 25/10 Crowd Sourcing

(35 minutes)



## Rapidly Generate and Sift a Group's Most Powerful Actionable Ideas

You can help a large crowd generate and sort their bold ideas for action in 30 minutes or less! With 25/10 Crowd Sourcing, you can spread innovations “out and up” as everyone notices the patterns in what emerges. Though it is fun, fast, and casual, it is a serious and valid way to generate an uncensored set of bold ideas and then to tap the wisdom of the whole group to identify the top ten. Surprises are frequent!

Distribute file cards to everyone. Pose a question. Ask everyone to think about it and then write his or her best idea clearly on the card. No names. When everyone has completed a card, invite participants to stand up, mill around, and pass their card to someone new. They should keep moving and passing cards without reading them until they hear the bell. Then ring the bell and have them stop and read the card to another person in a way that might “sell” them on the idea. Trade cards and rate the card on a scale of 1-5 on the back. 5 is fabulous, 1 is ok. Have them talk over the ratings with their partner and adjust as needed. Mill again and pass “his or her” card to someone else. Keep milling and passing. When they hear the bell, have them stop in front of another person and repeat the process. Repeat five times, in five rounds. By round five, each index card should have five ratings. Add them up. Ask, “Does anyone have a card with a score of 25... 24... 23... until you get a “yes.” Ask that person to read their card out loud. Continue with the countdown. Identify the top 10 high scores or more as needed.

Invite participants to think big and bold. Discover the most attractive ideas together by asking, “If you were ten times bolder, what big idea would you recommend? What first step would you take to get started?” Participants will be standing and milling about with an index card.

5 minutes	Explain the process and demonstrate one exchange-and-scoring interaction using a sample index card to clarify no reading aloud of the cards, only passing them from person to person so that each person has one and only one card in hand.
5 minutes	Invite each participant to write a big idea and first step on his or her card.
15 minutes	Conduct five 3-minute exchange-and-scoring rounds with time for milling (and laughing) in between.
1 minute	Ask participants to add the 5 scores on the back of the card they are holding.
5 minutes	Ask, “Who has a 25?” Invite those scored 25 to read out the idea and action step. Continue counting down. Stop when the top ten ideas have been shared.
4 minutes	End by asking, “What caught your attention about 25/10?”

25/10 Crowd Sourcing Notes:

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# 9 Whys

(20 minutes)



## Make the Purpose of Your Work Together Clear

With surprising simplicity, you can rapidly clarify for individuals what is essentially important in their work. You can quickly reveal when a compelling purpose is missing and avoid moving forward without clarity. When a group discovers an unambiguous shared purpose, more freedom and more responsibility are unleashed. You have laid the foundation for spreading and scaling innovations with fidelity.

Ask a thoughtful question and give participants a time to think about it individually for at least a minute. For example: What makes you excited to get up in the morning? - What difference are you hoping our organization will make in the world? - What opportunity facing us is most important to jump on now? Invite participants to pair up with someone. Each participant will get a turn being the question asker and the responder. The role of the question asker is to be an active listener, pose the question and ask “WHY?” at least nine times after hearing the answer, or a variation such as “Why is that important? And why do you care about that?”

Note: The role of the question asker is to be an active listener, pose the question and ask “WHY?” at least five times after hearing the answer or a variation such as “Why is that important? And why do you care about that?”

Have everyone get into groups of four, and then pair off for this exercise.

1 minute	Each person asks the other “What do you do when working on _____ (the subject matter at hand)? Make a short list of activities if appropriate.
5 minutes	Then ask, “Why is that important to you?” or “Why do you do it that way?” Keep asking, “Why? Why? Why?” up to nine times.
5 minutes	Switch roles and repeat step 2. Each participant will get a turn being the question asker and the responder.
5 minutes	Now the group of four is ready to discuss similarities and differences in each of their responses. Have them compare their experiences.
4 minutes	Have all of the groups share their exciting discoveries in a general discussion. How were the experiences similar and how were they different?

9 Whys Notes:

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# Agreement-&-Certainty Matrix

(45 minutes)



## Sort Challenges into Simple, Complicated, Complex, and Chaotic Domains

You can help individuals or groups avoid the frequent mistake of trying to solve a problem with methods that are not adapted to the nature of their challenge. The combination of two questions makes it possible to easily sort challenges into four categories: simple, complicated, complex, and chaotic.

A problem is simple when it can be solved reliably with practices that are easy to duplicate. It is complicated when experts are required to devise a sophisticated solution that will yield the desired results predictably. A problem is complex when there are several valid ways to proceed but outcomes are not predictable in detail. Chaotic is when the context is too turbulent to identify a path forward. A loose analogy may be used to describe these differences: simple is like following a recipe, complicated like sending a rocket to the moon, complex like raising a child, and chaotic is like the game “Pin the Tail on the Donkey.”

Many of our strategies and heuristics for working on problems are designed for simple or complicated situations. These strategies don't work well when things are complex because the situation is emergent and unpredictable. Introduce the idea of the Agreement-&-Uncertainty Matrix and invite the group to think about where the things they're working on might be mapped in this diagram.

5 minutes	In groups of four, each person creates a matrix with the x-axis as the degree to which a group is certain about what's going on and the y-axis as the degree to which there is agreement about what to do. Facilitator makes larger matrix for the wall.
5 minutes	Participants place challenges in the matrix based by answering: What is the degree of agreement among the participants regarding the challenge? What is the degree of certainty about what results will be generated from the solutions proposed?
5 minutes	Ask participants to discuss in pairs.
10 minutes	Invite them to chat with others in the group to find points of agreement, difference, and where there are mismatches.
5 minutes	Invite everyone to post their challenges on a large wall matrix.
5 minutes	Ask participants to form small groups and step back to reflect on, “What pattern do we see? Do any mismatches stand out that we should address?”
10 minutes	Invite whole group to share reflections and decide next steps.

Agreement-&-Certainty Matrix Notes:

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# Appreciative Interviews

(60 minutes)



## Discovering and Building on the Root Causes of Success

In less than one hour, a group of any size can generate the list of conditions that are essential for its success. You can liberate spontaneous momentum and insights for positive change from within the organization as “hidden” success stories are revealed. Positive movement is sparked by the search for what works now and by uncovering the root causes that make success possible. Stories from the field offer social proof of local solutions, promising prototypes, and spread innovations while providing data for recognizing success patterns. You can overcome the tendency of organizations to underinvest in social supports that generate success while overemphasizing financial support, time, and technical assistance.

Invite participants to pair up. Each will have a turn telling a story and being the interviewer. Tell a story about “a time when...” Have them choose a positive framework such as, a time when their relationship with customers really worked; a time when they were able to suggest an out-of-the-box idea and got a positive response; a time when collaboration between their teams was successful. In groups of 4, each person retells the story of their partner. Facilitator will collect insights and patterns for the whole group to see on a flip chart, and use 1-2-4-All to ask “How are we investing in the assets and conditions that foster success?”

Each person should think of a time when they worked on a challenge with others and they are proud of what they accomplished. Participants should sit in pairs facing each other, then in groups of four.

5 minutes	Describe the sequence of steps and specify a theme or what kind of story participants are expected to tell.
15 minutes	In pairs, participants take turns conducting an interview and telling a success story, paying attention to what made the success possible.
15 minutes	In groups of 4, each person retells the story of his or her pair partner. They should listen for patterns in conditions/assets supporting success and to make note of them.
15 minutes	Collect insights and patterns for the whole group to see on a flip chart. Summarize if needed.
10 minutes	Use 1-2-4-All to ask “How are we investing in the assets and conditions that foster success?” and “What opportunities do you see to do more?”

Appreciative Interviews Notes:

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# Celebrity Interview

(60 minutes)



## Reconnect the Experience of Leaders and Experts with People Closest to the Challenge at Hand

You can enable a large group of people to connect with a leader or an expert (the celebrity) as a person and grasp the nuances of how that person is approaching a challenge. With a well-designed interview, you can turn what would otherwise be a passive, often boring presentation into a personal narrative that is entertaining, imparts valuable knowledge, and reveals the full range of rational, emotional, and ethical/moral dynamics at play. You can often turn the interview into an invitation to action, drawing out all the elements needed to spark the participant group's imagination and encourage cohesive action.

This "talk show" atmosphere lets you: convey a small number of ideas associated with a key dimension of a topic or project in a compelling, memorable, engaging way; intrigue the audience enough to make them want to review more in-depth documents, handouts, and related materials that you provide before, during, and/or after the meeting; introduce a key player (source) and their relationship to the topic/project in a way that allows their individual personality, passion, and style to show up; establish an interactive, conversational, inviting tone to a meeting so that all participants will be more likely to speak up and be engaged in the meeting at later times; and avoid draining/deadening the energy in the meeting, which happens when people have to listen to any one voice for more than 5 minutes, especially if they are being given large amounts of data particularly text on slides.

The interviewer and celebrity should sit in the front of the room where everyone can see and hear the interaction.

3 minutes	Interviewer welcomes and introduces the celebrity and the topic to be discussed.
30 minutes	Interviewer asks questions that the audience would be expected to ask (both humor and gravity are appropriate).
10 minutes	Invite participants to generate additional questions in a 1-2-4-All conversation and then on 3-by-5-inch cards.
15 minutes	Interviewer sifts the cards, looking for patterns and asking additional questions to the celebrity.
2 minutes	Interviewer makes closing comments, thanks the celebrity.

### Celebrity Interview Notes:

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# Conversation Café

(60 minutes)



## Engage Everyone in Making Sense of Profound Challenges

You can include and engage any number of people in making sense of confusing or shocking events and laying the ground for new strategies to emerge. The format of the Conversation Café helps people have calm and profound conversations in which there is less debating and arguing, and more listening. Sitting in a circle with a simple set of agreements and a talking object, small groups will engage in rounds of dialogue with little or no unproductive conflict. As the meaning of their challenge pops into focus, a consensual hunch is formed that will release their capacity for new action.

Invite participants to create small groups. Introduce the idea of a “talking object” that will be used throughout the session. The person with the talking object speaks and everyone else listens. Pass around the talking object; each person speaks briefly to the topic, no feedback or response. You might suggest that this round is for a paragraph or two from each person. Then, again with the talking object, each person deepens his/her own comments or speaks to what has meaning now. You might suggest this round is for the equivalent of a page from each person. Next is an open, spirited conversation. Use the talking object. Suggest that whomever wishes to speak just hold out their hand to receive the object. Finally, with the talking object, each person says briefly what challenged, touched, or inspired them.

Divide participants into groups of four. There will be four rounds of conversations. The two first rounds using a talking object, the third one as an open conversation, and the last one using the talking object. All must agree to: suspend judgment as best they can; respect one another; seek to understand rather than persuade; invite and honor diverse opinions; speak what has personal heart and meaning; and go for honesty and depth without going on & on.

2 minutes	State the theme of the conversation, usually in the form of a question.
4 minutes	Each person shares what they are thinking, feeling, or doing about the theme or topic. One minute per person.
4 minutes	Each person shares thoughts and feelings after having listened to everyone else. One minute per person.
40 minutes	Open conversation.
10 minutes	Each individual shares their “take-aways.”

Conversation Café Notes:

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# Critical Uncertainties

(100 minutes)



## Develop Strategies for Operating in a Range of Plausible Yet Unpredictable Futures

You can help a diverse group quickly test the viability of current strategies and build its capacity to respond quickly to future challenges. This Liberating Structure prepares a group for strategy making. It does not produce a plan to be implemented as designed but rather builds resilience: the capacity to actively shape the system and be prepared to respond to surprise. This means being better able to see different futures unfolding, better prepared to act in a distributed fashion, and more ready to absorb disruptions resiliently.

Invite the group to identify and explore the most critical and uncertain “realities” in their operating environment. Then invite them to formulate strategies that would help them operate successfully in those different situations

This exercise requires a Scenario Matrix grid with two axes—X & Y—with a “more of <— —> less of” continuum for the factor to be represented on each axis. For example, for the X axis, if the number of new products is a critically uncertain factor, one end of the X axis is a large number of new products and the other is no new products. Repeat for the Y factor and axis. For instance, if patent protection is a critical factor, one end of the Y axis is strong patent protection and the other is no patent protection. Four quadrants are created.

10 minutes	In groups of four, ask participants to make a list of uncertainties they face by asking, “In your/our operating environment, what is impossible to predict or control their direction?”
10 minutes	Prioritize the most critical factors by asking, “Which factors threaten your/our ability to operate successfully?”
10 minutes	Select the two most critical and most uncertain and create a Scenario Matrix grid detailed on page 19.
20 minutes	The groups each names and writes a thumbnail scenario for one of the quadrants, then shares with the larger group.
20 minutes	The groups brainstorms 3 strategies that would help them operate successfully in the scenario and then shares with the larger group.
10 minutes	The whole group sifts results to identify which strategies can succeed in multiple quadrants and which can't but do protect from a plausible calamity.
10 minutes	Each small group debriefs with What, So What, Now What?
10 minutes	The four groups share their debriefs and the whole group makes first-steps decisions about their Now What.

# Design StoryBoards

(50 minutes)



## Define Step-by-Step Elements for Bringing Meetings to Productive Endpoints

The most common causes of dysfunctional meetings can be eliminated: unclear purpose or lack of a common one, time wasters, restrictive participation, absent voices, groupthink, and frustrated participants. The process of designing a storyboard draws out a purpose that becomes clearer as it is matched with congruent microstructures. It reveals who needs to be included for successful implementation. Storyboards invite design participants to carefully define all the micro-organizing elements needed to achieve their purpose: a structuring invitation, space, materials, participation, group configurations, and facilitation and time allocations. Storyboards prevent people from starting and running meetings without an explicit design. Good designs yield better-than-expected results by uncovering tacit and latent sources of innovation.

Design StoryBoards can include everything any good plan might include (roles, topics, questions, timings, materials needed, etc.). Unlike an agenda, it also includes and illustrates something about what the participants will experience in the course of the meeting. A storyboard makes it easier to design and plan collaboratively because it's easy for everyone to get a sense of the proposed flow of the gathering. One technique that can work well is to use post-it notes to represent different components of the meeting so you can move them around to see how different combinations might feel.

Invite a design team (a representative subset of the group) to create a detailed plan, including visual cues, for how participants will interact to achieve their purpose.

5 minutes	Clarify the purpose of working together (use 9 Whys if needed) by creating a purpose statement.
5 minutes	Describe the standard approach or microstructure you would normally use for this session (including who is normally present) and assess how it succeeds and fails in achieving the stated purpose.
10 minutes	Reexamine and strengthen the purpose statement and who needs to participate or be involved.
5 minutes	Brainstorm alternative microstructures that could achieve the purpose. Determine whether the purpose can be achieved in step one. If not, continue with first step only.
10 minutes	Determine which microstructures are best suited to achieving the purpose; choose one plus a backup.
10 minutes	Decide who will be invited and who will facilitate the meeting. Enter all your decisions in the blank storyboard.
5 minutes	Determine the questions and process you will use to evaluate your design (e.g., Did the design achieve desired outcomes? Did the group work together in a productive way?)

# Discovery & Action Dialogue (DAD)

(70 minutes)



## Discover, Invent, and Unleash Local Solutions to Chronic Problems

DADs make it easy for a group or community to discover practices and behaviors that enable some individuals (without access to special resources and facing the same constraints) to find better solutions than their peers to common problems. These are called positive deviant (PD) behaviors and practices. DADs make it possible for people in the group, unit, or community to discover by themselves these PD practices. DADs also create favorable conditions for stimulating participants' creativity in spaces where they can feel safe to invent new and more effective practices. Resistance to change evaporates as participants are unleashed to choose freely which practices they will adopt or try and which problems they will tackle. DADs make it possible to achieve frontline ownership of solutions.

DADs rely on asking the following seven progressive questions: **1**-How do you know when problem X is present? **2**-How do you contribute effectively to solving problem X? **3**-What prevents you from doing this or taking these actions all the time? **4**-Do you know anybody who is able to frequently solve problem X and overcome barriers? What behaviors or practices made their success possible? **5**-Do you have any ideas? **6**-What needs to be done to make that happen? Any volunteers? **7**-Who else needs to be involved?

Invite people to join a small group and participate in a DAD in order to uncover tacit or latent solutions to a shared challenge that are hidden among people in their working unit or community.

5 minutes	State the purpose of the initiative being discussed at the DAD and invite brief round-robin introductions.
60 minutes	Ask the 7 questions one by one in the order listed on page 23. Address them to the whole group and give everyone the opportunity to speak to each question. Make sure your recorder captures insights and action ideas as they emerge—big ones may emerge when you least expect it.
5 minutes	Ask your recorder to recap insights, action ideas, and who else needs to be included.

Discovery & Action Dialogue Notes:

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# Drawing Together

(40 minutes)



## Reveal Insights and Paths Forward Through Nonverbal Expression

You can help people access hidden knowledge such as feelings, attitudes, and patterns that are difficult to express with words. When people are tired, their brains are full, and they have reached the limits of logical thinking, you can help them evoke ideas that lie outside logical, step-by-step understanding of what is possible. Stories about individual or group transformations can be told with five easy-to-draw symbols that have universal meanings. The playful spirit of drawing together signals that more is possible and many new answers are expected. Drawing Together cuts through the culture of overreliance on what people say and write that constrains the emergence of novelty. It also provides a new avenue of expression for some people whose ideas would otherwise not surface.

Ask participants to practice drawing the five symbols: circle, rectangle, triangle, spiral, and star person. Then they should combine the symbols to create a story, working individually and without words, about “the journey” of working on a challenge or an innovation. Once done, they should create a second draft, in which they refine their story by dramatizing the size, placement, and color of the symbols. Finally, have them invite another individual or their small group to interpret their drawings. Remind them that the person who has done the drawing does not speak. Ask the whole group, “Together, what do the drawings reveal?” Use 1-2-4-All with larger groups.

Invite participants to tell a story about a challenge they face, or a common challenge, using only five symbols and no words. Introduce the idea of drawing together by drawing and describing a Circle (wholeness), Rectangle (support), Triangle (goal), Spiral (change), and Star person (relationship).

5 minutes	Invite participants to practice drawing the five symbols: circle, rectangle, triangle, spiral, & star person.
10 minutes	Invite participants to combine the symbols to create the first draft of a story, working individually without words, about “the journey” of working on a challenge or innovation.
10 minutes	Invite participants to create a second draft, in which they refine their story by dramatizing the size, placement, and color of the symbols.
10 minutes	Ask participants to invite another individual or their small group to interpret their drawings. Remind them that the person who has done the drawing does not speak.
5 minutes	Ask the whole group, “Together, what do the drawings reveal?” Use 1-2-4-All with larger groups.

Drawing Together Notes:

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# Ecocycle Planning

(95 minutes)



## Analyze Portfolio of Activities & Relationships to Identify Obstacles & Opportunities for Progress

You can eliminate or mitigate common bottlenecks that stifle performance by sifting your group’s portfolio of activities, identifying which elements are starving for resources and which ones are rigid and hampering progress. The Ecocycle makes it possible to sift, prioritize, and plan actions with everyone involved in the activities at the same time, as opposed to the conventional way of doing it behind closed doors with a small group of people. Additionally, the Ecocycle helps everyone see the forest AND the trees—they see where their activities fit in the larger context with others. Ecocycle Planning invites leaders to focus also on creative destruction, renewal, and typical themes regarding growth or efficiency.

This exercise requires the use of an Ecocycle map. To create one, start with a four-quadrant grid. Overlay this with an infinity symbol (a figure eight on its side). The label the quadrants as Birth (lower left), Maturity (upper right), Creative Destruction (lower right), and Renewal (upper left). Label the far right-hand side as Rigidity Trap and the far left-hand side as Poverty Trap. This is the route that a typical process will take, from Birth to Renewal. Invite the group to formulate action steps linked to each phase: actions that accelerate growth during the birth phase, increase efficiency during the maturity phase, compost rigid practices during the creative destruction phase, and prepare the ground for birth during the renewal phase. The leadership stance required for each phase can be characterized as entrepreneur, manager, heretic, and networker.

10 minutes	Introduce the idea of the Ecocycle and hand out a blank map to each participant. Then ask them to make a list of all the activities that occupy their time.
10 minutes	In pairs, decide the placement of every activity in the Ecocycle.
15 minutes	In groups of four, finalize the placement of activities on the Ecocycle map and write them on Post-it notes, one on each Post-it.
15 minutes	Ask each group to place their Post-its on the larger map one by one in order to create a whole-room map.
15 minutes	Ask the groups “What activities do we need to creatively destroy or stop to move forward? What activities do we need to expand or start to move forward?”
10 minutes	In small groups, for each activity that needs to be stopped (activities that are in the Rigidity Trap), create a first-action step.
10 minutes	In small groups, for each activity that needs to start or get more resources (activities in the Poverty trap), create a first-action step.
10 minutes	Have all focus on the “no consensus” activities. Have a conversation to understand the differences in placement. When possible, create first-action steps to handle each one.

Ecocycle Planning Notes:

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# Generative Relationships S.T.A.R.

(25 minutes)



## Reveal Relationship Patterns That Create Surprising Value or Dysfunctions

You can help a group of people understand how they work together and identify changes that they can make to improve group performance. All members of the group diagnose current relationship patterns and decide how to follow up with action steps together, without intermediaries. The STAR compass tool helps groups understand what makes their relationships generative. The compass used can also be used later to evaluate progress in developing relationships that are more generative.

Four attributes of STAR:

**Separateness:** the amount of diversity in perspective, expertise, and background among group members

*How diverse are we as a group? Do we draw out our diverse perspectives among members?*

**Tuning:** the level of listening deeply, reflecting, and making sense of challenges together

*How well are we in tune with one another?*

**Action:** the number of opportunities to act on ideas or innovate with group members

*How much do we act together?*

**Reason to work together:** the benefits that are gained from working together

*How important is it that we work together? How clear is our purpose?*

In small groups, invite participants to assess their working group or team in terms of four attributes, and then ask them to jointly shape action steps to boost generative results.

5 minutes	Participants individually assess where the team is in regard to each of the four STAR elements listed on page 29.
5 minutes	In small groups, participants place a dot along each compass point, then talk with their neighbors (1-2-4-All) about their placements, looking for consensus and differences.
5 minutes	Small groups decide what types of results are generated by the pattern of interaction they have identified (e.g., high Tuning + no Action = we get along well but accomplish little, high Action + low Tuning = routine results with no innovation, high Tuning + high Separateness + high Action + low Reason = many false starts, etc.).
5 minutes	In small groups, brainstorm action steps to boost elements that need attention.
5 minutes	Whole group assembles list of action steps and decides "What first steps can we take right now?"

Generative Relationships STAR Notes:

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# Heard, Seen, Respected (HSR)

(33 minutes)



## Practice Deeper Listening and Empathy with Colleagues

You can foster the empathetic capacity of participants to “walk in the shoes” of others. Many situations do not have immediate answers or clear resolutions. Recognizing these situations and responding with empathy can improve the “cultural climate” and build trust among group members. HSR helps individuals learn to respond in ways that do not overpromise or overcontrol. It helps members of a group notice unwanted patterns and work together on shifting to more productive interactions. Participants experience the practice of more compassion and the benefits it engenders. This is the practice of deeper listening and empathy with colleagues. Empathy removes the blocks to action in a way that is inclusive.

Invite participants to tell a story to a partner about a time when they felt that they were not heard, seen, or respected. Each person has 5 minutes for his or her story. Ask the listeners to avoid any interruptions other than asking questions like “What else?” or “What happened next?” Once the two stories are exchanged in the group as a whole, generate a reflective discussion about what was heard, learned and shared.

Invite participants to tell a story to a partner about a time when they felt that they were not heard, seen, or respected. Ask the listeners to avoid any interruptions other than asking questions like “What else?”

3 minutes	Introduce the purpose of HSR: to practice listening without trying to fix anything or make any judgments.
15 minutes	In pairs, each person has 7 minutes to share a story about NOT being heard, seen, or respected.
5 minutes	Partners share with one another the experiences of listening and storytelling. "What did it feel like to tell the story?"
5 minutes	In a foursome, participants share reflections by using 1-2-4-All to identify patterns revealed in the stories.
5 minutes	As a whole group, participants reflect on the questions, "How could HSR be used to address challenges revealed by the patterns?"

Heard, Seen, Respected Notes:

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# Helping Heuristics

(15 minutes)



## Surface Essential Needs Across Functions and Accept or Reject Requests for Support

Participants can gain insight into their own pattern of interaction and habits. Helping Heuristics make it possible for them to experience how they can choose to change how they work with others by using a progression of practical methods. Heuristics are shortcuts that help people identify what is important when entering a new situation. They help them develop deeper insight into their own interaction patterns and make smarter decisions quickly. A series of short exchanges reveals heuristics or simple rules of thumb for productive helping. Try them out!

Invite participants to view all interactions as offers that are either accepted or blocked (e.g., Improv artists are trained to accept all offers). Ask them to act, react, or observe the four patterns of interaction, and to reflect on their patterns as well as to consider shifting how they ask, offer, and receive help.

Helping Heuristics can reduce or eliminate common errors and traps when people are giving or asking for help. They can change unwanted *giving help* patterns that include: premature solutions; unneeded advice; adding pressure to force use of advice; moving to next steps too quickly; trying too hard not to overhelp. They can also change unwanted *asking for help* patterns that include: mistrusting; not sharing real problem; accepting help without ownership; and resenting not getting enough.

In groups of three, choose one member to be a “client,” another a “coach,” with the third acting as “observer.” Roles can stay the same or change from round to round.

2 minutes	There will be four 2-minute rounds of improvised interactions. During every round the person in the role of client shares a challenge he or she is passionate about. While the observer pays close attention, the coach responds in a sequence of patterns that is different for each round as follows.
2 minutes	1 <sup>st</sup> round: the response pattern is “Quiet Presence”: the coach accepts all offers with compassionate listening - see the Liberating Structure Heard, Seen, Respected (HSR).
2 minutes	2 <sup>nd</sup> round: the response pattern is “Guided Discovery”: the coach accepts all offers, guiding inquiry for mutual discoveries - see the Liberating Structure Appreciative Interview.
2 minutes	3 <sup>rd</sup> round: the response pattern is “Loving Provocation”: the coach interjects advice, accepting and blocking as needed when the coach sees something that the client does not - see the Liberating Structure Troika Consulting.
2 minutes	4 <sup>th</sup> round: the response pattern is “Process Mindfulness”: the coach and client accept all offers from each other, working at the top of their intelligence while noticing how novel possibilities are amplified.
5 minutes	Debrief the impact of all four helping patterns as experienced by clients, coaches, and observers. Repeat entire exercise if appropriate.

# Impromptu Networking

(20 minutes)



## Rapidly Share Challenges and Expectations While Building New Connections

You can tap a deep well of curiosity and talent by helping a group focus attention on problems they want to solve. A productive pattern of engagement is established if used at the beginning of a working session. Loose yet powerful connections are formed in 20 minutes by asking engaging questions. Everyone contributes to shaping the work, noticing patterns together, and discovering local solutions.

This is a great way to generate energy at the beginning of a meeting. It provides an opportunity for everyone to speak early. It gets everyone up and moving so blood is flowing. It signals that this will not be a meeting like all others. Ask everyone to stand up and move into a space where there is some elbowroom. Ask them to leave all their “stuff” behind. Invite everyone to think individually about a provocative question that relates to the purpose of the meeting. Make it a question that levels the playing field. No right answer. Something everyone has an equal ability to talk about. Tell participants that when they hear the bell, they should find a partner - someone they know less well than they know others. After 5 minutes ring the bell and have them move to a different partner. They do this for a total of three rounds. One thing to notice about this process is that everyone gets to speak early in the meeting.

There will be three rounds with 2-3 minutes per person to speak. This can also be combined with 1-2-4-All whole group process.

1 minute	Ask everyone to stand up and move into a space where there is some elbowroom. Ask them to leave all their “stuff” behind.
1 minute	Invite everyone to think about a question that relates to the purpose of the meeting - something everyone has an equal ability to talk about.
5 minutes	Tell participants that when the bell rings, they should find a partner - someone they know less well. Invite them to have a conversation about the suggested question for two minutes each.
10 minutes	Now, ring the bell and invite participants to find partner and have another conversation. Each round lasts five minutes. Between rounds, ask them to put a hand up if they are looking for a partner so they can see who else needs a partner.
3 minutes	After three “rounds” invite the group to sit back down and debrief them.

Impromptu Networking Notes:

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# Improv Prototyping

(20 minutes)



## Develop Effective Solutions to Chronic Challenges While Having Serious Fun

You can engage a group to learn and improve rapidly from tapping three levels of knowledge simultaneously: (1) explicit knowledge shared by participants; (2) tacit knowledge discovered through observing each other's performance; and (3) latent knowledge, i.e., new ideas that emerge and are jointly developed. This powerful combination can be the source of transformative experiences and, at the same time, it is seriously fun. Participants identify and act out solutions to chronic or daunting problems. A diverse mix of people is invited to dramatize simple elements that work to solve a problem.

In small groups, participants are asked to identify a frustrating challenge in their work and discover better ways to address the challenge by acting out the situation and solutions. The facilitator should set the stage by describing the challenge that will be acted out. Then a volunteer group enacts the scene on the stage. Each observer group watches and debriefs to identify successful elements from the scene, then pieces them into a new prototype and acts it out for their own group only. Then, participants from one of the observer groups who feel that they have an improved prototype, volunteer to come on stage and enact their version in front of the whole group. This process continues with as many rounds as necessary to arrive at one or more prototypes that are good enough to put into practice.

Invite participants to identify a frustrating challenge in their work, then to playfully experiment, invent, and discover better ways to address the challenge by acting out the situation and possible solutions. Participants should form small groups of 4-6.

5 minutes	Explain the following sequence of steps, and then set the stage by describing the scenario that will be acted out and the various roles.
5 minutes	Choose one of the groups to come to the stage and act out the scene.
5 minutes	Each observer group debriefs with 1-2-4-All to identify successful "chunks" from the scene, then pieces them into a new prototype and acts it out for their own group only.
5 minutes	Participants from one of the observer groups who feel they have an improved prototype volunteer to come on stage and enact their version in front of the whole group.
	Continue with as many rounds as necessary to arrive at one or more prototypes that are good enough to put into practice.

Improv Prototyping Notes:

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# Integrated~Autonomy

(65 minutes)



## Move from Either-or to Robust Both-and Solutions

You can help a group move from either-or conflicts to both-and strategies and solutions. You can engage everyone in sharper strategic thinking, mutual understanding, and collaborative action by surfacing the advantage of being both more integrated and more autonomous. Attending to paradox will reveal opportunities for profound leaps in performance by addressing questions such as: What mix of integrative control and autonomous freedom will advance our purpose? Where do our needs for global fidelity and consistency meet the needs for local customization and creative adaptability? This makes it possible to avoid bipolar swings in strategy that are frequently experienced by many organizations.

A productive starting question for this exercise has balance and sparks curiosity or a search for what is working. Avoid making one side of the question bad or less valuable to success such as, “How does our effort to be ONE integrated organization squash local autonomy?” Instead make your question equally appreciative of both sides, “How is it that we are both integrated and autonomous in our current operations?” When you start, the creative tension between the central and the local sides is relatively invisible. If the group gets stuck or starts to argue, tell each side to put on the hat of the other side and argue the opposite point of view.

Invite your group to explore the questions, “Will our purpose be best served by increased local autonomy, customization, competition, and freedom among units/sites? Or, will it be best served by increased integration, standardization, and control among units/sites? Or both?” Sit in groups of four.

5 minutes	Introduce the idea of Integrated~Autonomy by asking, “How is it that we can be more integrated and more autonomous at the same time?” Have examples ready.
10 minutes	Use 1-2-4-All to generate a list of activities by asking, “Where is there tension between our desire to standardize and the request for more customizing or autonomy?”
10 minutes	Ask participants to work in groups of four, and pick one activity from the list and ask, “What is the rationale for standardizing? What is the rationale for customizing?”
10 minutes	Using 1-2-4-All to develop action steps that achieve standardization. Using 1-2-4-All to develop action steps that achieve customization.
5 minutes	Ask, “Which action steps would boost both standardization and customization?”
15 minutes	Ask, “What modifications or creative ideas can be adopted to move standard or customized actions to good for both?”
10 minutes	Using 1-2-4-All, prioritize the most promising actions that promote both integration and autonomy.

# Min Specs

(50 minutes)



## Specify Only the Absolute “Must dos” and “Must not dos” for Achieving a Purpose

What is made possible? By specifying only the minimum number of simple rules, the Min Specs that must ABSOLUTELY be respected, you can unleash a group to innovate freely. Respecting the Min Specs will ensure that innovations will be both purposeful and responsible. Like the Ten Commandments, Min Specs are enabling constraints: they detail only must dos and must not dos. You will eliminate the clutter of nonessential rules, the Max Specs that get in the way of innovation. Often two to five Min Specs are sufficient to boost performance by adding more freedom AND more responsibility to the group’s understanding of what it must do to make progress.

Generate a list of all must-do and must-not-do activities (Max Specs) (for a challenging activity, new initiative, or strategic bottleneck) at first alone for one minute then in a small group for four minutes. After the list of Max Specs has been developed, ask the participants to reduce it to the absolute minimum needed to achieve their purpose. Then each small group tests each spec on its list against the purpose statement. If the spec can be violated and the purpose still achieved, the spec is dropped from the list. Then do a second round, keeping in mind the purpose and making sure that the list is down to what is truly important. Finally, compare across the small groups and consolidate to the shortest list.

Divide participants into groups of four. In the context of a challenging activity, a new initiative, or a strategic bottleneck, invite the participants to first generate the entire list of all the do’s and don’ts that they should pay attention to in order to achieve a successful outcome. This is the list of maximum specifications (Max Specs). After the list of Max Specs has been developed, ask the participants to reduce it to the absolute minimum needed to achieve their purpose.

5 minutes	Generate the list of all must-do and must-not-do activities (Max Specs), at first alone for one minute then consolidate and expand in the small group for four minutes.
15 minutes	Each group tests each spec on its Max Spec list against the purpose statement. If the spec can be violated and the purpose still achieved, the spec is dropped from the list.
15 minutes	Do a second round, keeping in mind the purpose and making sure that the list is down to what is truly important.
15 minutes	Compare across small groups and consolidate to the shortest list.

Min Specs Notes:

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# Open Space Technology

(100 minutes)



## Liberate Inherent Action and Leadership in Groups of Any Size

When people must tackle a common complex challenge, you can release their inherent creativity and leadership as well as their capacity to self-organize. Open Space makes it possible to include everybody in constructing agendas and addressing issues that are important to them. Having co-created the agenda and free to follow their passion, people will take responsibility very quickly for solving problems and moving into action. Letting go of central control (i.e., the agenda and assignments) and putting it in the hands of all the participants generates commitment, action, innovation, and follow-through.

Start off in one large circle, then moving into various smaller "sessions" around the room. Come back together in the circle at the end for final thoughts and wrap-up.

Participation in Open Space Technology is governed by the "Law of Two Feet" which states "Go and attend whichever session you want, but if you find yourself in a session where you are not learning or contributing, use your two feet!" It also relies on having high levels of Complexity (in terms of the tasks to be done or outcomes achieved), Diversity (in terms of the people involved and/or needed to make any solution work), Conflict (real or potential, meaning people really care about the central issue or purpose), and Urgency (meaning that the time to act was "yesterday").

Invite people to come and address a complex problem by creating an agenda, hosting sessions on topics they are passionate about, and joining any session that they care about. Chairs are arranged in a circle.

5 minutes	Introduce the concept and mechanics of Open Forum, including the Law of Two Feet and its Four Principles.
5 minutes	Participants write down a topic that they would like to spend time discussing with others.
15 minutes	Opening Circle: the large group creates a working agenda, as individuals post their issues in bulletin board style on the sessions they would like to convene.
60 minutes	Conveners facilitate their sessions for small groups, who develop recommendations and action plans. Notes are taken and later published for all to read.
15 minutes	Closing Circle: the large group comments on their experiences with Open Space and reflect on what they have learned.

Open Space Technology Notes:

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# Panarchy

(145 minutes)



## Understand How Embedded Systems Interact, Evolve, Spread Innovation and Transform

You can help a large group of people identify obstacles and opportunities for spreading ideas or innovations at many levels. Panarchy enables people to visualize how systems are embedded in systems and helps them understand how these interdependencies influence the spread of change. Participants become more alert to small changes that can help spread ideas up to other system levels; they learn how shifts at larger or lower system levels may release resources to assist them at another level. With better appreciation of the Ecocycle dynamics at play, the group creates “opportunity windows” for innovations to spread among levels and across boundaries.

This exercise requires the use of a large Panarchy chart, which is comprised of several Ecocycle maps placed on a wall, ascending from lower left to upper right. Participants will singly create a set of system levels that influence the spread of their ideas/innovation by asking, “What are the smallest-to-the-largest factors influencing your/our chances for success?” Include micro (particles, individual people, teams), meso (organizations, networks), and macro (culture, politics, myths) factors that contribute to the existence of the challenge being addressed. Once vetted by groups of four, Ecocycle maps will be created for the levels and opportunities/obstacles will be identified for each. Once that is complete, groups will have the opportunity to use What, So What, Now What? to prioritize all of the next steps.

Invite participants to identify what is contributing to the existence of a challenge at levels above and below them. Ask them to specify strategies and opportunities for change across all levels.

10 minutes	Introduce the idea of the Panarchy (& the Ecocycle if needed). Then ask each participant to generate the set of system levels that influence the spread of their ideas.
20 minutes	In pairs, “translate” the factors into 4–7 levels, create labels for each, and then in groups of four, compare their levels and finalize their chart with Post-its.
10 minutes	If there are multiple groups of four, create a single chart, by inviting each group to place any levels not previously included on the larger wall chart.
15 minutes	Ask foursomes “On which levels have resources been invested? Which levels have been neglected? Then share reflects from a few foursomes with the whole group.
25 minutes	Hand out blank Ecocycle maps and have groups to create one for a level. Then collect the maps and have each group present theirs to the entire group.
25 minutes	In small groups, brainstorm a list of obstacles and opportunities in regard to efforts to spread ideas/innovations. Ask, “Looking up and down the levels, what opportunities and obstacles do you see for change?” Once complete, prioritize the items that emerge.
10 minutes	For each opportunity and obstacle, create one first-action step using 1-2-4-All by asking, “What action can you take immediately to influence levels above and below you?”
30 minutes	Share action steps with the whole group & place Post-it notes on each level of the large Panarchy chart. Invite the group to take a close look at the chart. Use What, So What, Now What? to prioritize all of the possible next steps.

# Purpose-To-Practice (P2P)

(175 minutes)



## Design the Five Essential Elements for a Resilient and Enduring Initiative

By using P2P at the start of an initiative, the stakeholders can shape together all the elements that will determine the success of their initiative. The group begins by generating a shared purpose (i.e., why the work is important to each participant and the larger community). All additional elements—principles, participants, structure, and practices—are designed to help achieve the purpose. By shaping these five elements together, participants clarify how they can organize themselves to adapt creatively and scale up for success. For big initiatives, P2P makes it possible to include a large number of stakeholders in shaping their future initiative.

This exercise requires five worksheets per person, one for each of the following concepts:

**Purpose:** “Why is the work important to you and the larger community?”

**Principles:** “What rules must we absolutely obey to succeed in achieving our purpose?”

**Participants:** “Who can contribute to achieving our purpose and must be included?”

**Structure:** “How must we organize and distribute control to achieve our purpose?”

**Practices:** “What are we going to do? What will we offer to our users/clients and how will we do it?”

Have everyone get into groups of four and invite them to participate in the design of their new initiative in order to specify its five essential elements: purpose, principles, participants, structure, and practices.

5 minutes	Introduce the concept of P2P, the five elements, and the related questions. Hand out the five worksheets detailed on page 47 to each participant.
10 minutes	Use 1-2-4-All to generate individual ideas and stories for <b>Purpose</b> .
10 minutes	In groups of four, compare, sift, and amplify the top ideas for <b>Purpose</b> .
10 minutes	As a whole group, integrate themes and finalize ideas for <b>Purpose</b> .
120 minutes	Move to the remaining P2P elements ( <b>Principles, Participants, Structure, &amp; Practices</b> ) repeating the three steps of 1-2-4-All. Be prepared to revise previous elements as needed.
5 minutes	After each element ask, "Has this element shed new light that suggests revisions to previous elements?"
15 minutes	When complete, use What, So What, What Now? To make sense of all possible next steps and prioritize them as a whole group.

Open Space Technology Notes:

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# Shift & Share

(70 minutes)



## Spread Good Ideas and Make Informal Connections with Innovators

You can quickly and effectively share several innovations or useful programs that may lie hidden within a group, organization, or community. Shift & Share gets rid of long large-group presentations and replaces them with several concise descriptions made simultaneously to multiple small groups. A few individuals set up “stations” where they share in ten minutes the essence of their innovations that may be of value to others. As small groups move from one innovator’s station to another, their size makes it easy for people to connect with the innovator. They can quickly learn where and how new ideas are being used and how they might be adapted to their own situations. Innovators learn from the repetition, and groups can easily spot opportunities for creative mash-ups of ideas.

To begin, solicit volunteers who have something innovative to share. Coach them to bring some “show and tell” materials that tell a story at an “executive briefing” level to allow time for questions and interactions. Presenter will have a “location” in the room. Participant groups will “travel” to each station in turn so that they get to attend presentations by multiple innovators. Depending on the total time you can devote to this activity and the number of presenters you have with something to share, you might decide to do more than one round of Shift & Share. For example, with 5 presenters and 1 hour, participants could spend 15 minutes at each location.

Invite participants to visit 5 innovators who will share something new they are doing that may be of value to them. Identify the presenters for the innovation stations and form the same number of groups.

5 minutes	Describe the process: explain that small groups will move from station to station for a 10-minute presentation and brief feedback period.
50 minutes	Each small group goes to a different station for 10 minutes, where presenters conduct their sessions.
10 minutes	Participants ask questions or provide feedback to each station/session for 2 minutes.
5 minutes	Small groups move to the next station - 1 minute per move.

Shift & Share Notes:

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# Simple Ethnography

(415 minutes)



## Observe and Record Actual Behaviors of Users in the Field

You can enable participants to find novel approaches to challenges by immersing themselves in the activities of the people with local experience—often their colleagues on the front line or anyone who uses their product or service. You open the door to change and innovation by helping participants explore what people actually do and feel in creating, delivering, or using their offering. Their observations and experience can spur rapid performance improvements and expedite prototype development. The combined observations may make it easy to spot important patterns.

Simple Ethnography helps invisible routines become visible. It allows the participant to identify fundamental needs and innovative solutions, reveal tacit and latent knowledge not accessible by asking users for explicit needs (e.g., with focus groups), and show respect and trust by observing and interviewing people on the front line.

Invite participants to silently observe people with experience relevant to the challenge at hand and then follow up with interviews for more insight. Facilitators should be prepared to repeat steps if the core-group members don't feel they have a particularly powerful new approach to prototype.

In 1s or 2s, distribute participants among sites being observed. Afterwards, gather in a local setting (workplace, client organization) with a convenient space for sharing findings, photos, and videos.

5 minutes	Explain the problem to be solved and the current understanding of the situation.
5 minutes	Identify sites to observe and people to shadow that will reveal user experience in depth.
180 minutes	Invite participants to visit sites and observe without speaking interactions and activities, recording details and internal reflections as they go.
180 minutes	Ask participants to select behaviors observed that address the challenge in a novel fashion (in part or in whole) and follow up by asking the individuals they observed what they were feeling and doing as they engaged in the behavior.
15 minutes	Reconvene the group of ethnographers and use 1-2-4-All to compare notes and find patterns across observations or exceptional solutions.
20 minutes	Write up observations or compose stories that highlight needs and opportunities.
10 minutes	Feed insights into brainstorming and prototyping efforts.

Simple Ethnography Notes:

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# Social Network Webbing

(60 minutes)



## Map Informal Connections and Decide How to Strengthen the Network to Achieve a Purpose

Social Network Webbing quickly illuminates for a whole group what resources are hidden within their existing network of relationships and what steps to take for tapping those resources. It also makes it easy to identify opportunities for building stronger connections as well as new ones. The inclusive approach makes the network visible and understandable to everybody in the group simultaneously. It encourages individuals to take the initiative for building a stronger network rather than receiving directions through top-down assignments. Informal or loose connections—even your friends’ friends—are tapped in a way that can have a powerful influence on progress without detailed planning and big investments.

Invite the members of a core-working group with a shared purpose to create a map of their network and to decide how to expand and strengthen it. Ask them to name the people they are currently working with and those they would like to include in the future (i.e., people with influence or expertise they need to achieve their purpose). Then have them illustrate the connections in the network web with lines that advance their purpose. Finally, ask the whole group to devise strategies to: invite, attract, and “weave” new people into their work; work around blockages; and boost progress.

Use 1-2-4-All to generate the names of all the key groups. Then everyone together can generate the names of people in the network and construct the map.

5 minutes	Create a legend of all key groups in the network needed to achieve your purpose and assign a Post-it color or symbol for each.
5 minutes	Every core group member prints his or her name on a Post-it. Put the Post-its in a group in the center of the wall.
10 minutes	Ask all core group members, “What people do you know that are active in this work?” Tell them to create a Post-it and arrange it based on each person’s degrees of separation from each design group member.
10 minutes	Ask all core group members, “Who else would you like to include in this work?” Invite them to brainstorm and create Post-its for the other people they would like to include. Ask them to build the map of Post-its as a web with a core and periphery structure. Individuals in this group may their friends' friend.
15 minutes	Tell the core group to draw connecting lines asked, “Who knows whom? Who has influence and expertise? Who can block or boost progress?”
15 minutes	Ask the group to devise strategies to: 1) invite, attract, and “weave” new people into their work; 2) work around blockages; and 3) boost progress.

Social Network Webbing Notes:

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# TRIZ

(35 minutes)



## Stop Counterproductive Activities and Behaviors to Make Space for Innovation

You can clear space for innovation by helping a group let go of what it knows limits its success, and by inviting creative destruction. TRIZ makes it possible to challenge "sacred cows" safely and encourages heretical thinking.

Think about a difficult and complex problem you need to solve. Describe as many of the key elements of the result you want as you can. Be as specific as possible. Make a list of all you can do to make sure that you achieve the worst result imaginable with respect to your top objective. Then go down this list item by item and ask yourselves, 'Is there anything that we are currently doing that in any way, shape, or form resembles this item?' Be brutally honest to make a second list of all your counterproductive procedures. Finally, go through the items on your second list and decide what first steps will help you stop what you know creates undesirable results.

**Note:** The question "What must we stop doing to make progress on our deepest purpose?" induces seriously fun yet very courageous conversations. Since laughter often erupts, issues that are otherwise taboo get a chance to be aired and confronted.

There will be three 10-minute rounds. Divide participants into groups of 4-6. You can have as many groups as you like.

5 minutes	Introduce the idea of TRIZ and identify an unwanted result. If needed, have the groups brainstorm and pick the most unwanted result.
10 minutes	Each group uses 1-2-4-All to make a first list of all it can do to make sure that it achieves this most unwanted result.
10 minutes	Each group uses 1-2-4-All to make a second list of all that it is currently doing that resembles items on their first list.
10 minutes	Each group uses 1-2-4-All to determine for each item on its second list what first steps will help it stop this unwanted activity/program/procedure.

TRIZ Notes:

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# Troika Consulting

(31 minutes)



## Get Practical and Imaginative Help from Colleagues Immediately

You can help people gain insight on issues they face and unleash local wisdom for addressing them. In quick round-robin “consultations,” individuals ask for help and get advice immediately from two others. Peer-to-peer coaching helps with discovering everyday solutions, revealing patterns, and refining prototypes. This is a simple and effective way to extend coaching support for individuals beyond formal reporting relationships. It allows them to improve listening and consulting skills, develop the ability to work across disciplines and functional silos, and build the capacity to self-organize. Troika Consulting is always there for the asking for any individual who wishes to get help from colleagues or friends.

Invite participants to find two partners and sit down in a knee-to-knee group of three. Suggest that one member of the group be a timekeeper to keep the group on track. Give everyone time to reflect individually on a question. Think about a challenge you are facing in your work. What’s the question you most need to answer in order to move forward? What’s the biggest obstacle to making the changes you want to make? In each round of 10 minutes, one participant will share his or her challenge and ideas for next steps. The role of the partners is to ask questions to help them hone and improve their ideas. Next, the partners engage about how they might handle the challenge. Switch roles so that each member of the troika has a turn.

Invite the group to explore the questions “What is your challenge?” and “What kind of help do you need?” Any number of small groups of 3 chairs, knee-to-knee seating preferred. In each round, one participant is the “client,” the others “consultants”

1 minute	Invite participants to reflect on the consulting question (the challenge and the help needed) they plan to ask when they are the clients.
1 minute	Groups have first client share his or her question.
3 minutes	Consultants ask the client clarifying questions.
5 minutes	Client turns around with his or her back facing the consultants. Together, the consultants generate ideas, suggestions, coaching, and advice.
1 minute	Client turns around and shares what was most valuable about the experience.
20 minutes	Groups switch to next person and repeat steps.

Troika Consulting Notes:

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# User Experience Fishbowl

(60 minutes)



## Engage Everyone Simultaneously in Generating Questions, Ideas, and Suggestions

A subset of people with direct field experience can quickly foster understanding, spark creativity, and facilitate adoption of new practices among members of a larger community. Fishbowl sessions have a small inside circle of people surrounded by a larger outside circle of participants. The inside group is formed with people who made concrete progress on a challenge. The fishbowl design makes it easy for people in the inside circle to illuminate what they have done by sharing experiences while in conversation with each other. The informality breaks down the barriers with direct communication between the two groups and facilitates questions and answers flowing back and forth.

Create a circle of chairs in the center of a larger circle. 5-6 is a good number. If you have a very large group, there may be multiple outer circles. Invite a small group of people that have direct experience with the challenge into the small circle of chairs at the center. Ask this group to talk about the challenge together, sharing stories of their direct experience and insights as they would if they were in a coffee shop. They talk to each other, NOT the audience. Afterwards, invite the audience to ask questions and share their insights about the conversation while those in the center circle listen. Gather the questions.

Arrange 5-6 chairs in an inner circle with remainder of chairs in an outer circle. Ask those in the "fishbowl" to describe their experience—the good, the bad, and the ugly—informally, concretely, and openly. Ask them to be casual and avoid "presenting" to the audience. Invite the people outside the fishbowl to listen, observe nonverbal exchanges, and formulate questions.

5 minutes	Explain the fishbowl configuration and steps.
20 minutes	Inner circle conversation goes on until it ends on its own.
5 minutes	Satellite groups in outer circle formulate observations and questions.
20 minutes	Questions submitted to the inner circle are answered, and back-and-forth interaction between inner and outer circles goes on as needed until all the questions are answered.
10 minutes	Debrief using W <sup>3</sup> (What? So What? Now What?) and ask, "What seems possible now?"

User Experience Fishbowl Notes:

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# What I Need From You (WINFY)

(70 minutes)



## Surface Essential Needs Across Functions and Accept or Reject Requests for Support

People working in different functions and disciplines can quickly improve how they ask each other for what they need to be successful. You can mend misunderstandings or dissolve prejudices developed over time by demystifying what group members need in order to achieve common goals. Since participants articulate core needs to others and each person involved in the exchange is given the chance to respond, you boost clarity, integrity, and transparency while promoting cohesion and coordination across silos: you can put Humpty Dumpty back together again!

Invite participants to ask for what they need from others (often in different functions or disciplines) to be successful in reaching a specific goal. You will also ask them to respond unambiguously to the requests from others. This exercise is an excellent way to learn how to articulate functional and/or personal needs clearly, reestablish and/or improve communication inside functional clusters, and build trust so that group members can share accountability with integrity. Remember to strictly enforce the rule that the only responses are yes, no, I will try, or whatever (no further elaboration is allowed).

In debriefing, try to draw out that people are good at complaining and not so good at asking for what they need. WINFY helps you move from complaints to valid requests. Have fun and encourage a safe amount of drama!

In a large room that can accommodate 3 to 7 functional clusters of participants in different sections, arrange chairs for a group of 4 to 6 people in a circle in the middle of the room.

4 minutes	Describe steps below and reiterate the challenge being addressed. Emphasize that requests must be clear and specific. Make it clear that no answers other than Yes, No, I Will Try, and Whatever will be allowed. Position the functional clusters around the room.
15 minutes	Functional clusters use 1-2-4-All to write down their top two needs from each of the other functions. Needs are expressed as requests that can be delivered in the following form: "What I need from you is ____." Clusters select a spokesperson from their group.
1 minute	All spokespersons gather in a circle in the middle of the room.
15 minutes	Spokespersons state their two needs to each of the circle of spokespersons. At this stage, spokespersons take notes of requests, but no one gives answers or responses.
10 minutes	Each spokesperson writes down one of four responses to each request: Yes, No, I Will Try, and Whatever (whatever means the request was too vague to provide an answer).
10 minutes	Addressing one spokesperson in the group at a time, every spokesperson in the circle repeats the requests made by him or her, then shares his or her responses (Yes, No, I Will Try, and Whatever). No discussion! No elaboration!
15 minutes	Debrief with What, So What, Now What?

# What, So What, Now What? (W<sup>3</sup>)

(45 minutes)



## Together, Look Back on Progress to Date and Decide What Adjustments Are Needed

You can help groups reflect on a shared experience in a way that builds understanding and spurs coordinated action while avoiding unproductive conflict. It is possible for every voice to be heard while simultaneously sifting for insights and shaping new direction. Progressing in stages makes this practical; from collecting facts about What Happened, to making sense of these facts with So What, and finally to what actions logically follow with Now What.

After a shared experience, ask, “WHAT? What happened? What did you notice, what facts or observations stood out?” Then, after all the salient observations have been collected, ask, “SO WHAT? Why is that important? What patterns or conclusions are emerging? What hypotheses can you make?” Then, after the sense making is over, ask, “NOW WHAT? What actions make sense?”

Note: Check with small groups to clarify appropriate answers to each question (some groups get confused about what fits in each category) and share examples of answers with the whole group if needed. Appreciate candid feedback and recognize it.

Have everyone get into small groups of four to six.

10 minute	WHAT? - Individuals work alone for one minute on “What happened? What did you notice, what facts stood out?” then in their small groups answering the same questions.
5 minutes	Salient facts from small groups are shared with all and collected.
10 minutes	SO WHAT? - Individuals work alone for one minute on “Why is that important? What patterns are emerging?” then in their small groups answering the same questions.
5 minutes	Salient patterns and conclusions from small groups are shared with all and collected.
10 minutes	NOW WHAT? - Individuals work alone for one minute on “Now what? What actions make sense?” then in their small groups answering the same questions.
5 minutes	Salient actions from small groups are shared with all and collected.

9 Whys Notes:

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# Wicked Questions

(25 minutes)



## Articulate the Paradoxical Challenges That a Group Must Confront to Succeed

You can spark innovative action while diminishing “yes, but...” and “either-or” thinking. Wicked Questions engage everyone in sharper strategic thinking by revealing entangled challenges and possibilities that are not intuitively obvious. They bring to light paradoxical-yet-complementary forces that are constantly influencing behaviors and that are particularly important during change efforts.

Wicked questions are used to expose the assumptions that we hold about an issue or situation. Articulating these assumptions provides an opportunity to see the patterns of thought and surface the differences in a group. These patterns and differences can be used to discover common ground or to find creative alternatives for stubborn problems. A question is “wicked” if there is an embedded paradox or tension in the question. Wicked questions do not have obvious answers. Their value lies in their capacity to open up options and bring to the surface the fundamental issues that need to be addressed.

**Wicked Question:** How can we sustain quality standards across the system while allowing for local innovation?

**Not a Wicked Question:** How can we succeed when the guys at headquarters are such bozos?

Divide participants into groups of four. Ask a paradoxical question such as “What opposing-yet-complementary strategies do we need to pursue simultaneously in order to be successful?” Avoid data questions that can be answered with more analysis and nasty questions that appoint blame.

5 minutes	Introduce the concept of Wicked Questions and paradox. Give the following template, “How is it that we are ___ and we are ___ simultaneously?” as the sentence to complete by inserting the two opposite strategies that are at play.
5 minutes	First alone then in small groups, each participant generates pairs of opposites or paradoxes at play in his or her work using the Wicked Question format.
5 minutes	Each group selects its most impactful and wicked Wicked Question. All selected Wicked Questions are shared with the whole group.
10 minutes	Whole group picks out the most powerful ones and further refines the Wicked Questions.

Wicked Questions Notes:

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# Wise Crowds

(15 minutes)



## Tap the Wisdom of the Whole Group in Rapid Cycles

Wise Crowds make it possible to instantly engage a small or large group of people in helping one another. You can set up a Wise Crowds consultation with a small group of four or five people or with a group as big as one hundred or more. Individuals “clients” can ask for help and get it in a short time from all the other group members. Each consultation taps the expertise and inventiveness of everyone in the group. Individuals gain more clarity and increase their capacity for self-correction and self-understanding, and develop their ability to ask for help. During a Wise Crowds session, the series of individual consultations makes the learning cumulative as each participant benefits not only from being a client, but also from being a consultant several times in a row.

At the beginning of this exercise, coach the clients that they don’t need to provide the entire history of the saga nor all the gory details. Think of it as verbally sketching out the highlights for the rest of the group. The Consulting Team can ask a few questions for clarification, but should resist the temptation to go into major “data gathering” mode. After the Consulting Team’s independent conversation, the Client shares, “Here’s what I heard that intrigued, surprised, or resonated with me.” Then, the conversation can continue freely for the amount of time set.

Divide participants into groups of four. Ask each participant, when their turn as “client” comes up, to briefly describe his or her challenge and ask others for help. The other participants are to act as a group of “consultants” whose task it is to help the “client” clarify his or her challenge and to offer advice or recommendations. Each client requesting a consult gets fifteen minutes broken down as follows:

2 minutes	The client presents the challenge and request for help.
3 minutes	The consultants ask the client clarifying questions. Once complete, the client turns their back to the consultants and gets ready to take notes.
8 minutes	The consultants ask questions and offer advice and recommendations, working as a team, while the client has his or her back turned.
2 minutes	The client provides feedback to the consultants: what was useful and what he or she takes away.

Wise Crowds Notes:

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