Missouri Public Libraries Community Engagement Toolkit

This publication is supported by the Institute of Museum and Library Services under the provisions of the Library Services and Technology Act as administered by the Missouri State Library, a division of the Office of the Secretary of State.

This Toolkit contains the following sections:

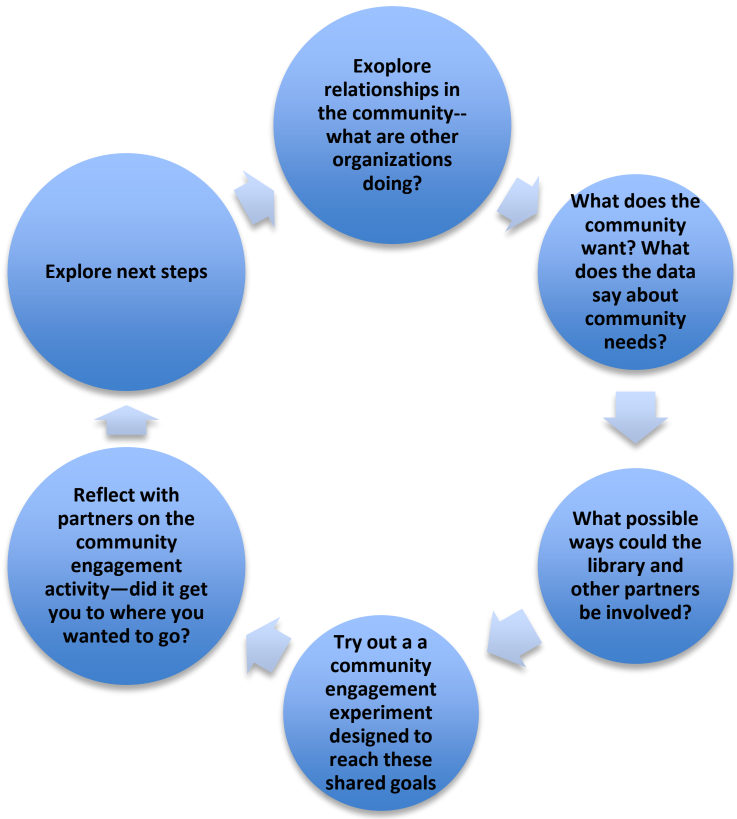
Section I—Community engagement, what is it and why is it important?

Libraries have long been interested in community engagement. As their role in the community shifts, they have been exploring ways of using their resources and providing services beyond their traditional realms. In fact, a recent initiative of the American Library Association, "Libraries Transforming Communities," seeks to strengthen librarians' roles as core community leaders and change-agents. (http://www.ala.org/transforminglibraries/libraries-transforming-communities)

It appears that the dialogue around community engagement for libraries is here to stay, but what is community engagement exactly, and how do we build it? There is no simple or single answer to the question, "*what is community engagement?*"

Community engagement:

- Involves exploring different types of partnerships with community organizations and individuals.
- Means being open to community agendas and goals, instead of having a clear agenda or goal in mind and seeking support to get there. Instead of asking, what can you do to help me, it asks, what can we do together to support our community? At the heart of community engagement is relationship building.
- Has no single, well-defined outcome. Each initiative will have different results that will be dependent on the community, the types of partnerships that evolve and the community's aspirations and needs.
- Is BOTH a process AND an outcome. Engagement is an end result, as well as the work along the way.
- Community engagement does not stop. It does not begin and end with one community engagement outcome; it can instead become a way the library does business. We like to think of community engagement as a cycle. The diagram that follows illustrates the cyclical nature of community engagement.


Exoplore relationships in the community--what are other organizations doing?
What does the community want? What does the data say about community needs?
What possible ways could the library and other partners be involved?
Try out a a community engagement experiment designed to reach these shared goals
Reflect with partners on the community engagement activity—did it get you to where you wanted to go?
Explore next steps

.

Section II—Assessing community needs through data

The goal of any community data analysis is to help guide decision making, so that library staff are making informed decisions and not decisions based on their own opinions or judgements. In this process, the first step is to figure out what data is already being collected and available to your library. Your library may be collecting data directly from library users or community members that can inform your decision-making processes.

What follows are some general principles for assessing community needs through data:

a. Be clear about the goal of your data exploration. How are you thinking that additional data will be useful to you?
b. Determine the types of data that you are interested in reviewing or collecting.
c. Reach out to community partners and ask them what data they are collecting and might be able to share.
d. Identify other existing data resources that can inform your efforts. Possible sources include:
   i. **The American Community Survey:** The ACS collects data on an ongoing basis, January through December, to provide communities with the information they need to make important decisions. Easy Stats gives you quick and easy access to selected statistics collected by the U.S. Census Bureau through the American Community Survey. With the American Community Survey, detailed demographic and economic statistics are available every year for the nation's communities and their people. This interactive tool provides the latest statistics about where you live. You can search different geographies including states, counties, incorporated places (towns/cities) and census designated places (CDP). With Easy Stats, you can view detailed racial, age and sex breakdowns and much more. https://www.census.gov/acs/www/data/data-tables-and-tools/easy-stats/
   ii. **The Brookings Institution:** The Brookings Institution is a nonprofit public policy organization based in Washington, DC. Its mission is to conduct high-quality, independent research and, based on that research, to provide innovative, practical recommendations that advance three broad goals:
      - Strengthen American democracy;
      - Foster the economic and social welfare, security and opportunity of all Americans; and
      - Secure a more open, safe, prosperous and cooperative international system.

      Research by topic area can be found at: http://www.brookings.edu/research#trade/topics/

Once you have some data, it is important to view it with an open mind. It can be helpful to do this with a group of people in order to assess how it informs your thinking regarding your community exploration. The following data reflection tool provides prompt questions to guide you through a data reflection process.

The data reflection process

Important to remember:

- Describe only what you see—the data in front of you
- Resist the urge to immediately work on solutions
- Seek to understand differences
- Ask questions when you don't understand
- Surface the lenses and experiences you bring to the data
- Surface assumptions and use data to challenge and support them

Questions for looking at data:

Step 1: Clarifying focus
What are we attempting to monitor/explore/learn?

Step 2: Making predictions
What are your predictions for what the data will show?

Step 3: Exploring the data
What are you noticing in the data?
What surprises you?
What are the strengths that stand out?
What themes are you noticing?
What connections are you making?

Step 4: Analyzing causal factors
How is the data different from what you expected? How is it the same?
What might be causing this data to emerge?

Step 5: Construct new learning
What are we learning about our community?
What might we want to pay attention to in the future?

Step 6: Learning about collecting data and the tools we use:
What are we learning about the data collection process?
What might we want to pay attention to in the future?

Step 7: Commit to application
How might we apply what we have learned?
Who will do what by when?

Area 7—Reflection
How has this data review process been useful?

Section III—The Partner Mapping Process—Steps in planning and implementing the engagement process

The Partner Mapping Toolkit included in the Appendices provides detailed guidance on the 8 steps in the Partner Mapping process. This process has been designed to support libraries and other organizations in developing community partnerships to reach shared goals.

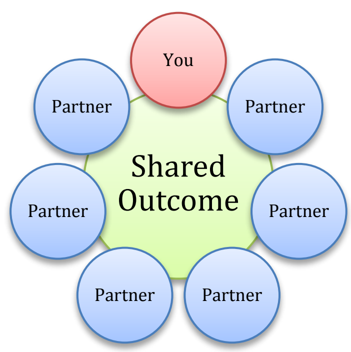
Part 1 of the Toolkit is a narrative description of the process. Part 2 provides templates to support you. Use the Toolkit in a way that works for you. Some people follow the process from beginning to end; others pick and choose and use it *a la carte.*

From:

Organizations working independently to meet their own needs

To:

Organizations collaborating to reach the same shared goal



In developing this community engagement tool, we have taken a step-by-step approach, dividing the work into eight stages. The full document provides instructions for each step, plus helpful templates for organizing your work.

8 Stages of Partner Mapping

Stage 1	Stage 2	Stage 3	Stage 4	Stage 5	Stage 6	Stage 7	Stage 8
team	shared goal	area	partners	people	interviews	next steps	conversations

Section IV—Partner Mapping: Identifying, reaching, cultivating and sustaining partnerships

The first 6 states of the Partner Mapping Process are focused on identifying, reaching out to others, and cultivating partnerships. The work of cultivating partnerships is the work of keeping in touch, and nurturing those relationships in a way similar to how we naturally nurture friendships. Some people do this easily. Others need to track how they keep in touch and plan to re-connect with people. The first 6 stages of the Partner Mapping process (described fully in the Toolkit) are as follows:

Stage 1: Form a team to help with the partner mapping process. This team will assist in brainstorming potential partners, eventually reaching out to, and meeting them. The team can be comprised of board members and/or staff.

Stage 2**:** Articulate a wide goal. This makes the goal more likely to be shared by others. For example: creating a healthier community, or increasing youth resilience are wide goals. Narrower goals that could limit potential partners include: creating a Friends Group or getting more school-aged children in to the library. At this early stage of exploration, forming a wide goal is the most useful for identifying potential partners.

Stage 3: Define the geographical area for your exploration. This could be a neighborhood, community, city or state.

Stage 4: Brainstorm potential partner organizations, like businesses, government agencies, other nonprofits, funders, churches, neighborhood associations, etc.

Stage 5: Contact people in the organizations identified in *Stage 4*, and ask to meet or talk on the phone.

Stage 6: Hold interviews with change makers from the organizations contacted in *Stage 5*. Your goal is to ascertain which of those organizations actually would prove a good fit, which share a common goal, which share values, and which are interested in exploring partnering. Partnership building is having a different conversation. This means that you must ask different types of questions and provide opportunities for people to engage.

- The **identification of information** about existing resources, strengths, and assets of individuals and organizations in the community, and discovery of what is working that could be built upon,
- The **development of relationships** with individuals and organizations who share a common goal of community health and are interested in working with others to explore how to leverage existing resources, and
- Some **initial ideas** of how partnerships could be formed or expanded to maximize existing resources.

Things to keep in mind when thinking about this phase

The goals of the conversations are to:

- Start building relationships or renew existing relationships,
- Learn about potential new partners and learn more about existing/past partners,
- See if and how others want to be involved in the future, and
- Begin to make connections and identify potential opportunities for collaboration.

Section V—The library's role in meeting community needs

Stages 7 and 8 of the Partner Mapping Toolkit look at possible ways that community engagement efforts might unfold. Because the work is varied, there is no single role that a library may adopt as the result of a community engagement process.

Stages 7 and 8 are as follows:

> ***Stage 7:*** Assess what you have learned. Groups that have done this have found immediate ways to collaborate with new partners toward shared goals. What could you begin doing right now? Did you find out about existing groups you could see joining? Did the people you interviewed want to meet with others?
>
> ***Stage 8:*** If there is interest in forming a new multi-organizational collaboration, then it may be time to convene a community conversation.

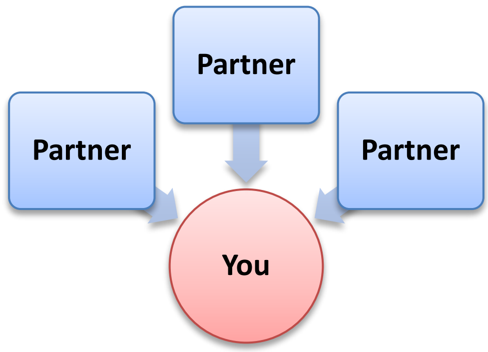
There are three possible structures for the partnerships that may emerge:

- **Possibility 1: Partnerships form—**Partnerships are formed with individual partners/organizations to leverage impact and further shared goals.
- **Possibility 2: Entering an existing collaboration or coalition—**You enter into an existing coalition/collaboration in order to leverage impact and further shared goals.
- **Possibility 3: Formation of a new collaboration or coalition—**With key partners identified in this process, you form a new collaboration/coalition to leverage impact and work toward shared goals.

The relationships and shared work developed in each of these scenarios are equally valuable. There is no single desired outcome of the partner mapping process. As long as you are building connections that have their foundation in shared goals and work to increase impact, this is success.

The following graphics illustrate the three possible outcomes:

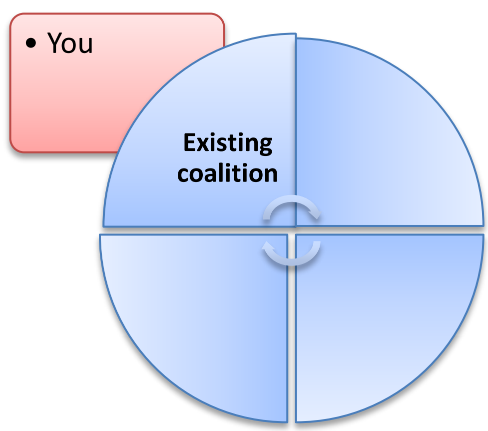
<u>Possibility 1: Partnerships form</u>



If your conversations result in the formation of partnerships with multiple individual organizations, the following considerations could help guide your work:

- As you become comfortable with the first wave of partnership building, think about reaching out to other potential partners by revisiting the categories of organizations in Stages 3-6 and identifying new categories to focus on.
- Think about expanding your work by broadening your geographic area.

<u>Possibility 2: Enter an existing coalition</u>



If in the course of your conversations you discover that there is already a coalition that shares your vision for the community, and you decide to join, the following considerations could help guide your work:

- How are you able to leverage your assets and resources to increase community impact?

- How can you utilize the work done in stages 1-7 to support the work of this collaboration? Are their new partners you have identified who could be at the table?

<u>Possibility 3: Forming a new collaboration or coalition to leverage impact and further shared goals</u>

If your conversations lead to an interest in forming a new collaboration or coalition, then you may need to host a community conversation. The following considerations could help guide your work:

- Who on your team will support you in planning for the community conversation?
- What are the goals of your community conversation?
- Who has the facilitation skills necessary to help plan and orchestrate the conversation?

Resources and attachments:

Attachment 1: Partner Mapping Overview
Attachment 2: Partner Mapping Toolkit Part 1
Attachment 3: Partner Mapping Toolkit Part 2
Attachment 4: Six Secrets of High Impact Presenting, which describes facilitation techniques used during trainings and meetings
Attachment 5: Collective Leadership Reading Activity
Attachment 6: Collective Leadership Assessment
Attachment 7: Seven Norms of Collaboration
Attachment 8: Facilitation Tips
Attachment 9: Additional Resources

"If you want to build a ship, don't drum up people to collect wood and don't assign them tasks and work, but rather teach them to long for the endless immensity of the sea."
- Antoine de Saint Exupéry

What is Partner Mapping?

Partner Mapping is a process designed to help organizations explore what could be possible if they expanded their collaborative work through a community engagement effort. It aims to help them discover new opportunities and resources that are made possible by partnering to reach a shared goal.

In developing this community engagement tool, we have taken a step-by-step approach, dividing the work into eight stages. The full document provides instructions for each step, plus helpful templates for organizing your work.

8 Stages of Partner Mapping

Stage 1	Stage 2	Stage 3	Stage 4	Stage 5	Stage 6	Stage 7	Stage 8
team	shared goal	area	partners	people	interviews	next steps	conversations

Stage 1: Form a team to help with the partner mapping process. This team will assist in brainstorming potential partners, eventually reaching out to, and meeting them. The team can be comprised of board members and/or staff.

***Stage 2*:** Articulate a wide goal; it is more likely to be shared by others. For example: creating a healthier community, or increasing youth resilience are wide goals. Narrower goals that could limit potential partners include: reducing smoking, or preventing teen pregnancy. At this early stage of exploration, forming a wide goal is the most useful for identifying potential partners.

Stage 3: Define the geographical area for your exploration. This could be a neighborhood, community, city or state.

Stage 4: Brainstorm potential partner organizations, like businesses, government agencies, other nonprofits, funders, churches, neighborhood associations, etc.

Stage 5: Contact people in the organizations identified in *Stage 4*, and ask to meet or talk on the phone.

Stage 6: Hold interviews with change makers from the organizations contacted in *Stage 5*. Your goal is to ascertain which of those organizations actually would prove a good fit, which share a common goal, which share values, and which are interested in exploring partnering.

Stage 7: Assess what you have learned. Groups that have done this have found immediate ways to collaborate with new partners toward shared goals. What could you begin doing right now? Did you find out about existing groups you could see joining? Did the people you interviewed want to meet with others?

Stage 8: If there is interest in forming a new multi-organizational collaboration, then it may be time to convene a community conversation.

Go to www.wholonomyconsulting.com and click on the Collective Impact page to download the full Partner Mapping documents:
Building Capacity for Collective Impact Toolkit:

- Part 1: Description of the Partner Mapping Process
- Part 2: Forms and tools for the partner mapping process Partner Mapping

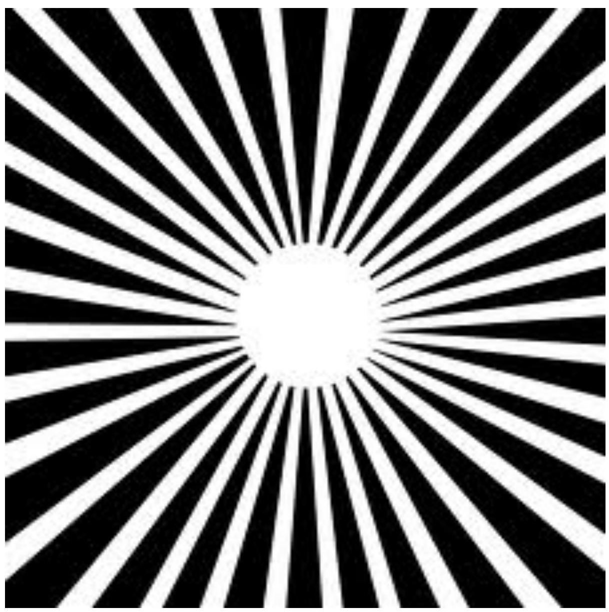
Resources:

- Jane Wei-Skillern and Sonia Marciano, *The Networked Nonprofit*, Stanford Social Innovation Review, Spring 2008: http://www.ssireview.org/articles/entry/the_networked_nonprofit/
- Fay Hanleybrown, John Kania and Mark Kramer, *Channeling Change: Making Collective Impact Work*, Stanford Social Innovation Review, January 26, 2012: http://www.ssireview.org/blog/entry/channeling_change_making_collective_impact_work

Building Capacity for Collective Impact Toolkit Series

Strategy 1: Partner Mapping

Part 1: Description of the Partner Mapping Process



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September 2012

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consulting, llc

CONTENTS

Part 2 is available for purchase at IdeaEncore, https://www.ideaencore.com/

Part 1: SECTION I—Introduction

The following Partner Mapping Toolkit is a step-by-step guide to assessing the resources, interests, and readiness of existing and potential partners for collaborating towards a shared goal. This Toolkit can be used by any organization that has a desire to deepen their partnerships, form new collaborations, or explore readiness for a Collective Impact Initiative.

The Partner Mapping Toolkit is designed for teams to work through the following stages:

Stage	Focus	Outcome
Stage 1	**Identify your team**	An identified team of people to conduct the partner mapping process
Stage 2	**Define a shared goal**	A goal that team members share
Stage 3	**Select a geographic area**	Agreement upon a geographic area to start partner mapping
Stage 4	**Brainstorm existing and potential partners**	A list of existing and potential organizations for partner mapping
Stage 5	**Identify people to connect with**	List of individuals from existing and potential partners to meet with/interview
Stage 6	**Conduct exploratory interviews**	Interviews conducted to identify interest and resources of potential partners
Stage 7	**Determine next steps**	A reflection on information gathered and agreed upon next steps
Stage 8	**Partnership development and community conversations**	Shared action toward shared goals

We recommend first reading the entire document before beginning the work of moving through the stages.

Part 2: Forms and Tools provides resources to support you in this process. The complete list of forms and tools is listed on page 20.

These tools were developed and tested by the county health departments in Arizona, with the Arizona Department of Health Services staff coordinating the effort.

Wholonomy Consulting provided technical assistance through funding from the St. Luke's Health Initiative (SLHI) during 2008-2009. Thanks to SLHI for funding this work and for approving the use of the materials presented in this Toolkit. Thanks to all the people involved in testing these tools and reviewing earlier versions of this document.

SECTION II—What is partner mapping?

Traditional approaches to increasing impact in the social sector have focused on growing and sustaining organizations—growing a budget, growing the number of programs, increasing staff and services delivered by individual organizations.

Recent attention has focused on multiple organization collaborative efforts and Collective Impact initiatives. In these initiatives, nonprofits and other organizations form collaborations to work together toward shared goals and outcomes.

Resources:

- Jane Wei-Skillern and Sonia Marciano, ***The Networked Nonprofit***, Stanford Social Innovation Review, Spring 2008: http://www.ssireview.org/articles/entry/the_networked_nonprofit/
- Fay Hanleybrown, John Kania and Mark Kramer, *Channeling Change: Making Collective Impact Work*, Stanford Social Innovation Review, January 26, 2012: http://www.ssireview.org/blog/entry/channeling_change_making_collective_impact_work

This Toolkit were created as part of an initiative of the Arizona Department of Health Services. Through this initiative Arizona's county health departments were charged with working with community partners to reach shared goals. The health departments developed partnerships and collaborations around the shared goal of increasing community health. The tools in this Toolkit were piloted with 15 county health departments.

The eight stages presented in this Toolkit are designed to help organizations explore what could be possible if they expanded their collaborative work.

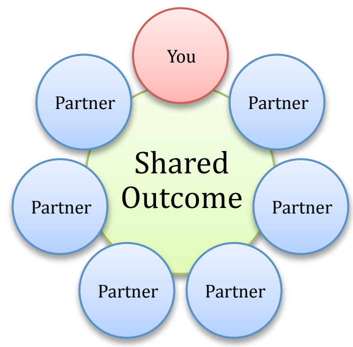
This Toolkit is designed to help organizations discover new possibilities and resources that are made possible by partnering to reach share a shared goal.

From:

Organizations connecting to reach their own goals

To:

Organizations collaborating to meet the same shared goal



SECTION III—The eight stages of partner mapping

Stage 1: **Identify your team**

Who is on your team?

Team members are valuable. They can help give input into decisions. They can share the work. They can help identify other potential partners and action steps for collaborative work.

The following set of activities has been developed for a team to complete together. Team members may be from one single organizational entity, or they may represent a number of different organizations.

As you think about undertaking a partner mapping process with your organization or team, who are some of the people that could be on your team?

See Part 2: Forms and tools for the partners mapping process, Stage 1

Stage 2: **Define a shared goal**

When you start this process, it's useful to have the goal of your team or group articulated in a broad way. The broader a goal is, the more likely that others will be aligned, that they can see their work and mission nested within this larger goal. If you articulate a goal narrowly, people will be less able to see their work aligned with the goal.

Wide goal—is the 50 ft version of a goal
Narrow goal—is the 1 ft version of a goal

Example

The county health departments first articulated their goal narrowly—tobacco cessation. Using this goal they were unable to identify community partners; they were the only show in town when it came to tobacco cessation. When they articulated a wider goal—improving health—they found more potential partners to engage with. They realized that they could bring the work of tobacco cessation to a wider initiative aimed at improving community health.

What are some of the ways you might describe your wide goal?

See Part 2: Forms and tools for the partners mapping process, Stage 2

Stage 3: **Select a geographic area**

Where do you want to begin? After you've put together your team and articulated your wide goal, it's time to define the geographic area that you will be mapping. This could be a community, a neighborhood, a city, a region, a school district, etc. It's a place to start.

Remember, you can always go back later and expand the geographic area.

> ***Example***
>
> With the county health departments we suggested that they start with geographic areas where they felt the most comfortable—to look first to the low hanging fruit.
>
> Some chose an entire county, others chose regions within the county and others chose a specific community.

See Part 2: Forms and tools for the partners mapping process, Stage 3

Stage 4: **Brainstorm existing and potential partners**

We think of this stage rather like doing a jigsaw puzzle. For many people, one of the first steps when completing a jigsaw is to put the pieces right side up, before you begin putting them together.

Translated into partner mapping—you need to have a good idea of all the possible partners before you begin your work.

See Part 2: Forms and tools for the partners mapping process, Stage 4, forms (a)-(g)

Stage 4: Part 1: Brainstorm categories

In this step your team will brainstorm past, existing, and potential partners in specific categories within the geographic area you have selected.

Example

The categories of organizations used by the county health departments that pilot tested this Toolkit included the following:

- Schools and colleges
- Libraries
- Businesses
- Government agencies and public services i.e. social services
- Law enforcement etc.
- Places of worship
- Non-profit/community-based organizations
- Youth programs
- Parks/recreation
- Service clubs i.e. rotary, hospitals, doctors, and clinics

Your team can use this list as a place to start. You might also want to add some other types of organizations.

List all those you can think of that might be relevant for your partner mapping process.

See Part 2: Forms and tools for the partners mapping process, Stage 4: Part 1, forms (a)-(b)

Stage 4: Part 2: Brainstorm organizations in categories

Within each category (such as youth programs) brainstorm the specific organizations you might want to reach out to, and what you already know about them. This will help your team decide who to reach out to, and what you want to learn from a meeting.

See Part 2: Forms and tools for the partners mapping process, Stage 4: Part 2, form (c)

Stage 4: Part 3: Explore what you already know

This step is designed to help you explore the partners identified in Stage 4: Part 2.

For existing partners—it's an opportunity to think about how you work with them now, how you worked with them in the past, and to begin the process of exploring what you'd like to learn more about.

For past partners—it's a time to think about how you used to work together, what that work looked like and, again, to explore what you'd like to learn more about.

For potential partners—it's a time to think about what you already know about the potential partners, and what you'd like to learn more about.

See Part 2: Forms and tools for the partners mapping process, Stage 4: Parts 3 and 4, forms (d)-(g)

Stage 4: Part 4: Record, synthesize and reflect

Once your team has gathered the information **in Stage 4 - Parts 1, 2,** and **3**, you can put it together and begin the process of synthesizing and reflecting. This will help guide you as you decide with whom you would like to meet first to engage in the partner mapping process.

See Part 2: Forms and tools for the partners mapping process, Stage 4, form (d)-(g)

Stage 5: **Identify people to connect with**

At this point, your team has brainstormed the geographic area that you want to explore, the types of organizations in this geographic area, and some specific organizations that you might reach out to.

Now your team will decide who to conduct interviews with (potential or existing partners) and who will be conducting those interviews.

Then it's time to start making calls.

See Part 2: Forms and tools for the partners mapping process, Stage 5, form (a) and (b)

Stage 6: **Conduct exploratory interviews**

Now it's time to help your team prepare for and conduct interviews.

These are exploratory interviews. At this stage in the process it is important to keep an open mind. There is not yet anything specific that your organization would like to do. You are assessing the interest and feasibility of collaborating toward a shared goal.

These interviews or meetings will help you identify ways that you might be able to work with other organizations toward shared goals. They can lay the groundwork for future collaborative work.

Use the following pointers to guide you in your questioning:

- **Keep it broad—**remember the goal is to include potential partners, not exclude.
- **Be open**—at this point you have no clear idea of what partnerships could develop or lead to.
- **Keep an exploratory mindset**—your goal is to connect with people and to explore their work.

We have provided some sample questions that are purposefully broad (**See Part II*:* Forms and Tools for Stage 6**). You can use these to start with. Feel free to add your own. The questions aim to help you find out what other organizations are doing and which ones might share a wide goal with you.

See Part 2: Forms and tools for the partners mapping process, Stage 6, form (a) - (d)

Stage 7: **Determine next steps**

After your team has conducted interviews, you will have more information regarding which organizations are interested in working together toward shared goals.

Team reflection questions:

1. Which organizations are interested in working together toward shared goals?
2. What have you learned about the individuals that you have met with, the goals they have, the ways they are working toward those goals, and their interest in exploring working collaboratively with others? How can this help you?
3. At this point, would it be useful to have more meetings— reaching out to other potential partners?
4. Do you want to bring the people you met with together into a larger group meeting?
5. What other next step might your team take?

Remember—Take immediate action on any opportunities to partner that were identified during the interviews and meetings.

> ***Example***
>
> The organizations that piloted these tools all found immediate ways to partner with organizations they met with. For them, this first round of interviews created lasting partnerships with different types of partners, including churches, gyms and neighborhood groups.

See Part 2: Forms and tools for the partners mapping process, Stage 7

Stage 8: **Partnership development and community conversations**

This stage is designed for those groups that realize there is interest in convening a larger group, bringing those potential partners interviewed together.

The process is designed to be generative and emergent. There is no single recommended best outcome to this part of the process.

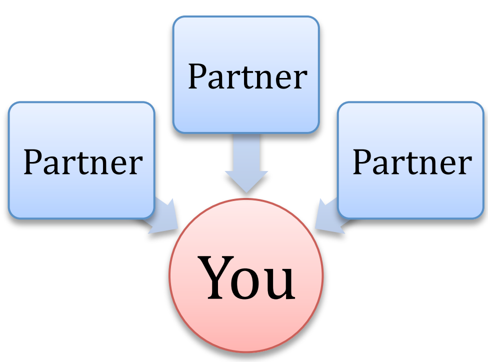
There are three possible structures for the partnerships that may emerge:

- **Possibility 1: Partnerships form—**Partnerships are formed with individual partners/organizations to leverage impact and further shared goals.
- **Possibility 2: Entering an existing collaboration or coalition—**You enter into an existing coalition/collaboration in order to leverage impact and further shared goals.
- **Possibility 3: Formation of a new collaboration or coalition—**With key partners identified in this process, you form a new collaboration/coalition to leverage impact and work toward shared goals.

The relationships and shared work developed in each of these scenarios are equally valuable. There is no single desired outcome of the partner mapping process. As long as you are building connections that have their foundation in shared goals and work to increase impact, this is success.

The following graphics illustrate the three possible outcomes:

Possibility 1: Partnerships form



If your conversations result in the formation of partnerships with multiple individual organizations, the following considerations could help guide your work:

- As you become comfortable with the first wave of partnership building, think about reaching out to other potential partners by revisiting the categories of organizations in Stages 3-6 and identifying new categories to focus on.
- Think about expanding your work by broadening your geographic area.

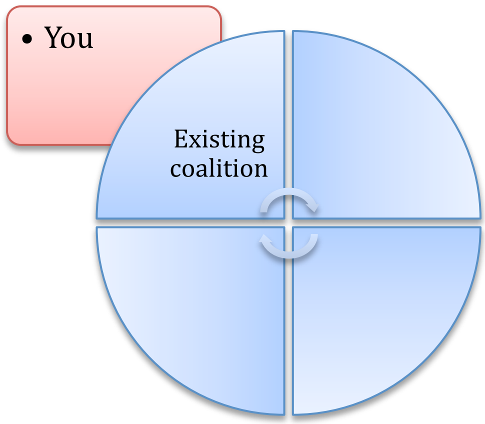
Example

One county health department experienced great success in forming individual partnerships. Their county had many existing coalitions, and they decided the greatest opportunity for them to increase impact was to work in developing and enhancing their partnerships with other organizations, one at a time.

The story:
"Our approach has been to work with a variety of different groups. We first research the organization to determine what their goals may be. We have an open discussion about their goals and objectives and then we see where our message could potentially fit in. Here is a list of some of what we have done.

- At health clubs, including L.A. Fitness, Gold's Gym, The Jewish Community Center, Desert Sport and Fitness, and the YMCA, we have partnered with the personal trainers and provided information to perform brief interventions. We have trained five people at the YMCA to facilitate cessation classes.
- Through religious organizations we have had great success. In partnership with the Catholic Diocese in our area our program is currently working with eight parishes. Information regarding the ASHLine has been included in their weekly bulletins.
- In partnership with OBGYN clinics we are providing a bag with secondhand smoke information and tips. The clinics are stuffing their own information along with ours and giving them to clients.
- At Behavioral Health Agencies 10 staff have completed the training necessary to provide cessation services to their clients. COPE Community Services is currently in talks to have a representative from their outreach staff complete the training as well.
- We have also entered into partnerships with or are working with Community Wellness Coalitions, 12 step groups, animal welfare organizations, County Juvenile Court Center, and the Salvation Army."

Possibility 2: Enter an existing coalition



If in the course of your conversations you discover that there is already a coalition that shares your vision for the community, and you decide to join, the following considerations could help guide your work:

- How are you able to leverage your assets and resources to increase community impact?
- How can you utilize the work done in stages 1-7 to support the work of this collaboration? Are their new partners you have identified who could be at the table?

Possibility 3: Forming a new collaboration or coalition to leverage impact and further shared goals

Example 2

One county health department that pilot tested this process invited all the people who they interviewed in the partner mapping process to meet together and discuss existing resources.

The meeting was very successful. As a result of the discussions, people realized they did not know a lot about what other organizations were doing, and became aware of potential opportunities to collaborate. In the first meeting of the larger group, people introduced themselves and shared information about their work.

Participants enjoyed the meeting and decided they wanted to meet again as they saw the benefit of continuing to increase their knowledge of what was happening in their community.

If your conversations lead to an interest in forming a new collaboration or coalition, then you may need to host a community conversation. The following considerations could help guide your work:

- Who on your team will support you in planning for the community conversation?
- What are the goals of your community conversation?
- Who has the facilitation skills necessary to help plan and orchestrate the conversation?

See Part 2: Forms and tools for the partners mapping process, Stage 8

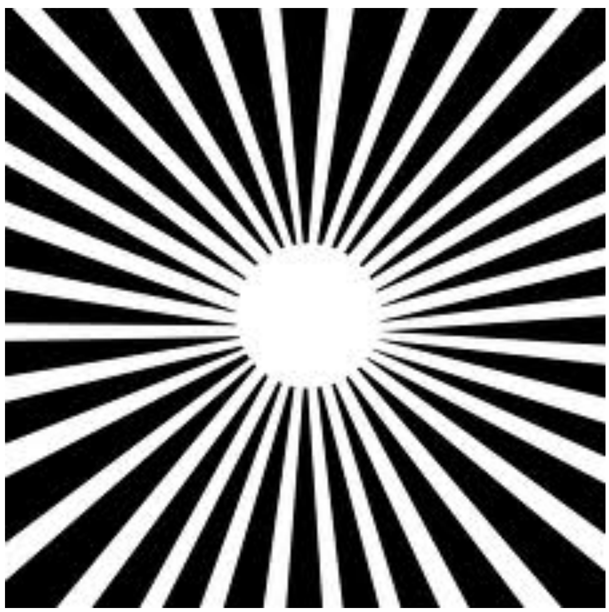
See Part 2—Forms and tools for the partners mapping process*

Stage	**Forms**
Stage 1	Form 1—Team report form
Stage 2	Form 2—Goal report form
Stage 3	Form 3—Geographical area report form
Stage 4	Form 4 (a)—Brainstorm categories
	Form 4 (b)—Brainstorm categories (blank version)
	Form 4 (c)—Brainstorm within a specific category
	Form 4 (d)—Chart summary for existing partners
	Form 4 (e)—Chart summary for past partners
	Form 4 (f)—Chart summary for potential partners
	Form 4 (g)—Synthesis report form
Stage 5	Form 5(a)—Existing/past partners to contact
	Form 5 (b)—Potential partners to contact
Stage 6	Form 6 (a)—Interview cover sheet
	Form 6 (b)—Note taking form, existing/past partners
	Form 6 (c)—Note taking form, new partners
	Form 6 (d)—Meeting results summary
Stage 7	Form 7—Collaboration steps
Stage 8	Partnership development and community conversations

Building Capacity for Collective Impact Toolkit Series

Strategy 1: Partner Mapping

Part 2: Forms and tools for the partner mapping process



Developed by
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September 2012

Part 2—Forms and tools*

*** The forms and tools included in this document are designed for use with:**

Part 1: Description of the Partner Mapping Process

STAGE 1—Identify your team

Form 1—**Team report form**

Use this report form to document the members of your team.

Who is on your team?

Name	**Organization**	**Possible /agreed upon role** (brainstorming, conducting interviews, etc.)

Form 2—**Goal report form**

Guiding question:

- What is your wide goal? This is the goal you will be sharing with existing and potential partners.

Examples: improve health, create communities for all ages, improve education, etc.

Ideas for wide goal:

Wide goal: ____

Notes:

STAGE 3—Select a geographic area

Form 3—**Geographic area report form**

When you have selected a geographic area to focus on complete this sheet to record/ report your selected area.

Guiding questions:

- Which geographic area has your team selected?
- What criteria were used for selection?
- Who was involved in the selection of the geographic area?

Note:
It is important to build consensus among the team engaged in this process around the choice of geographic area.

Tip: There is no right answer or right place to start and there are no right or wrong reasons for selecting a geographic area.

Name: ______________________________________ Date: __________________________

Organization: ____

1. Geographic area selected for partner mapping:

   ____

2. Reasons for selecting this geographic area:
   ____

   ____

3. People involved in selection of geographic area:
   ____

   ____

STAGE 4—Brainstorm existing and potential partners

Form 4 (a)—**Brainstorm categories**
Form 4 (b)—**Brainstorm categories (blank version)**
Form 4 (c)—**Brainstorm within a specific category**
Form 4 (d)— **Chart summary for existing partners**
Form 4 (e)— **Chart summary for past partners**
Form 4 (f)— **Chart summary for potential partners**
Form 4 (g)—**Synthesis report form**

Stage 4: Part 1:

In this step your team will brainstorm past, existing, and potential partners in specific categories in the geographic area selected.

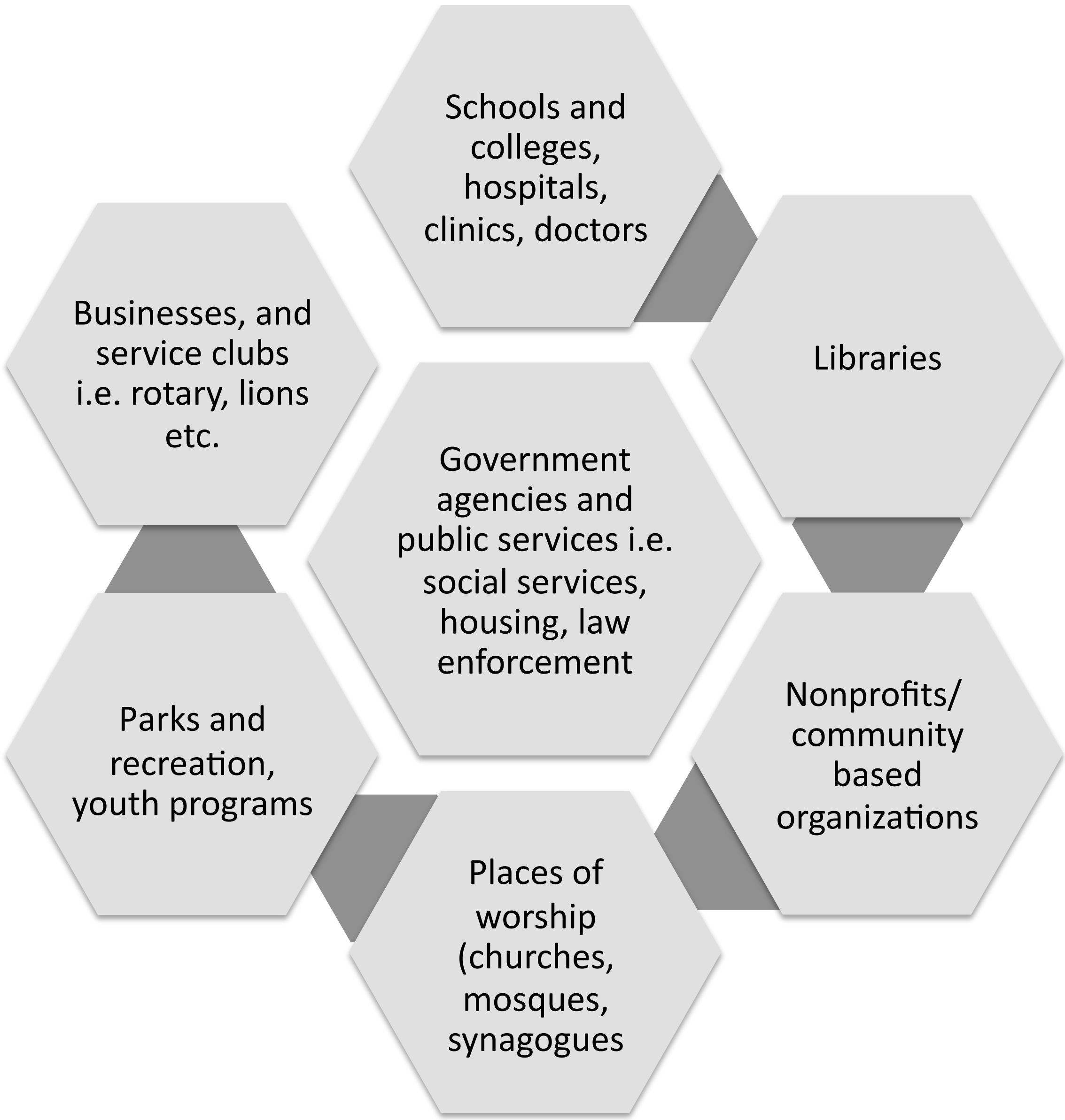
Your team can use the following graphic templates:

- **Form 4 (a): Brainstorm categories**—a graphic to help you brainstorm all the organizations and groups in each of these categories in your communities. This example shows the categories we used with the county health departments.

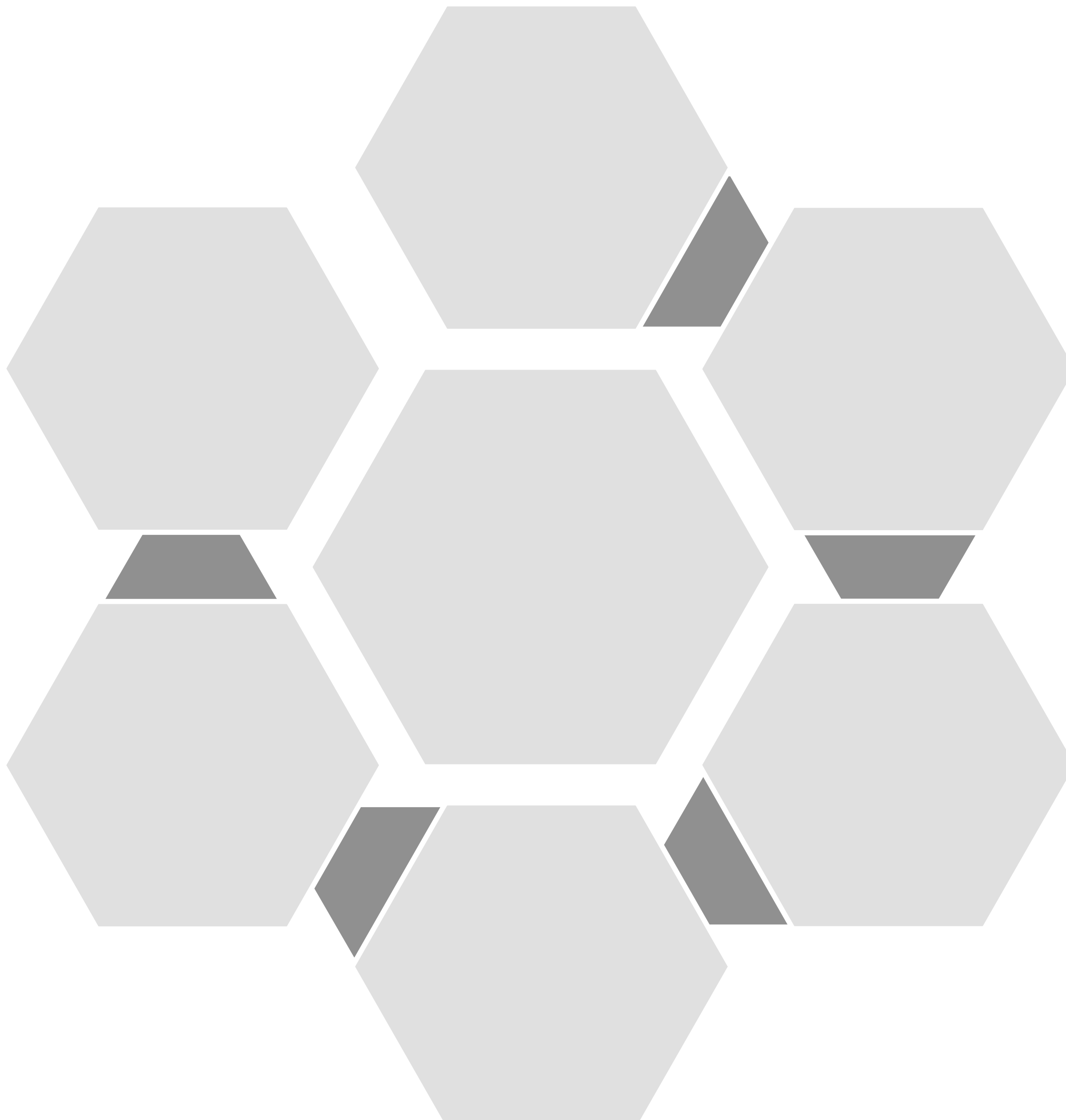
- **Form 4 (b): Brainstorm categories (Blank version)**—this could be used to brainstorm other categories.

> **Tip:** What is important to remember here is that your team do this without judgment—this is not a time to comment on the caliber of a potential partner or a past experience, rather a time to open up to new possibilities.

Form 4 (a)—**Brainstorm categories**



Form 4 (b)—**Brainstorm categories (blank version)**



Stage 4: Part 2:

Within each category (such as youth programs) brainstorm the specific organizations you might want to reach out to, and what you already know about them. This is helpful in planning who your team wants to meet with, and what you want to learn from your meetings.

Once 4 (a) or (b) have been completed, 4 (c) allows for further brainstorming within a specific category area.

Your team can use the following graphic template:

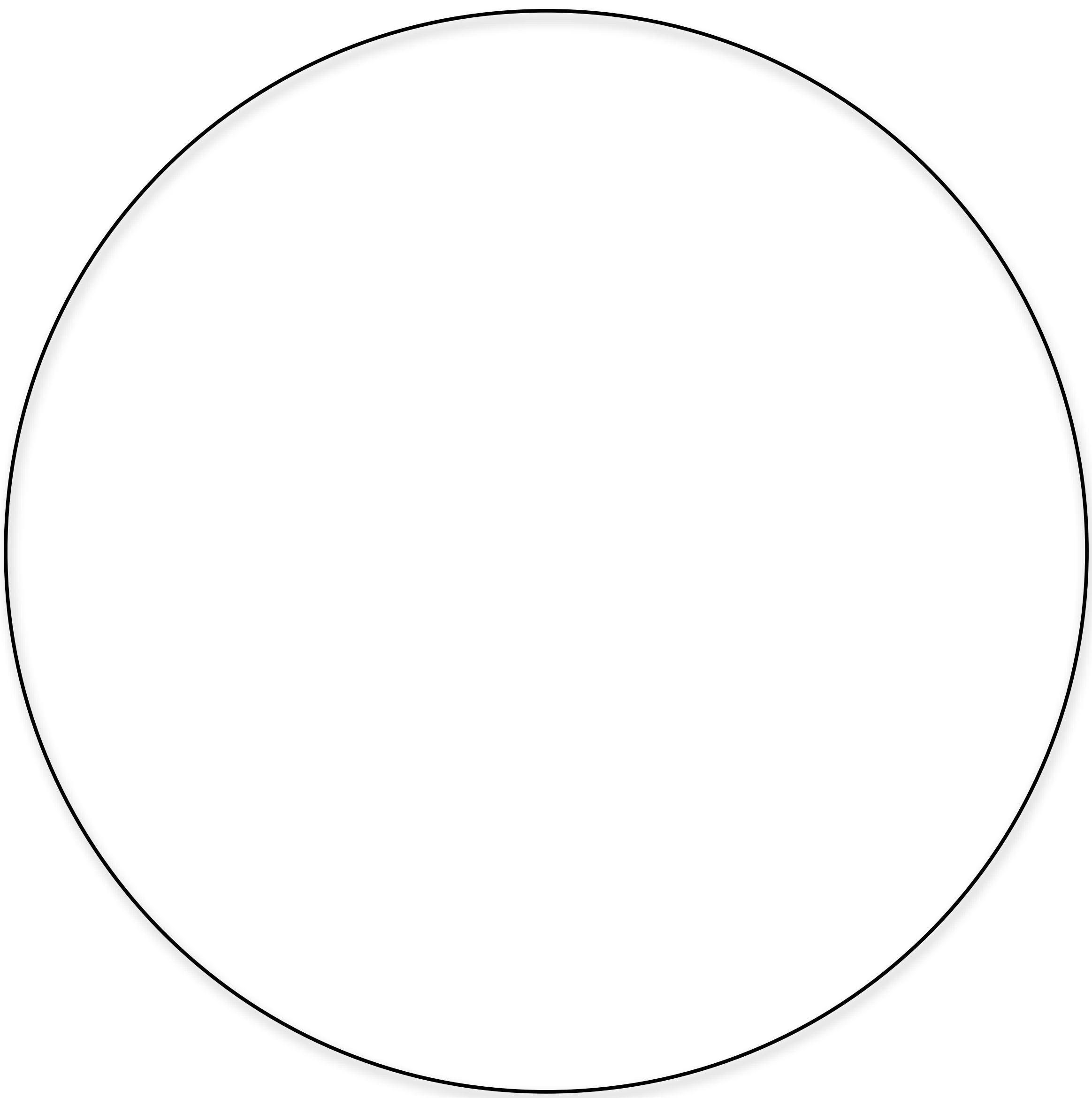
- **Form 4 (c): Brainstorming within a specific category**

Form 4 (c)—**Brainstorm within a specific category**

Note: It is simple to complete this graphic by hand. Alternatively, a bigger version could be made on a flipchart and completed with marker or post-in notes.

Category to brainstorm ____

Organizations in this category:



Stage 4: Part 3: Explore what you already know

This step is designed to help you explore the partners that have been identified in Stage 4: Part 2.

For existing partners—it's an opportunity to think about how you work with them now, how you worked with them in the past, and to begin the process of exploring what you'd like to learn more about.

For past partners—it's a time to think about how you used to work together, what that work looked like and, again, to explore what you'd like to learn more about.

For potential partners—it's a time to think about what you know about the potential partner and what you'd like to learn more about.

Questions for brainstorming before setting up interviews:

A. Detail for existing partners

1. Organization name	2. What are we currently doing with these partners?	3a. What would we like to do with them that we aren't currently doing?	3b. What would we like to do more of?	4. What do we want to learn more about?

B. Detail for past partners

1. Organization name	2. What did we do with these partners in the past?	3. What would we possibly like to do with these partners in the future?	4. What do we want to learn more about?

C. Detail for potential partners

1. Name of organization	2. What do we know about what they are doing?	3. What do we want to learn more about?

Stage 4: Part 4: Record, synthesize and reflect

Once your team has gathered the information in Parts 1, 2, and 3, you can put it together to begin synthesizing and reflecting. This will help you make decisions about who to set up meetings with.

Use the following Forms:

- **Form 4 (d)—Chart summary for existing partners**
- **Form 4 (e)— Chart summary for past partners**
- **Form 4 (f)— Chart summary for potential partners**
- **Form 4 (g)—Synthesis report form**

Form 4 (d)—**Chart summary for existing partners**

Detail on Category: ___________________________ (for example businesses, libraries, schools) **for existing partners**

1. Organization name	2. What are we currently doing with these partners?	3a. What would we like to do with them that we aren't currently doing?	3b. What would we like to do more of?	4. What do we want to learn more about?

Form 4 (e)—**Chart summary for past partners**

Chart 1: Detail on category: ___________________________ (for example businesses, libraries, schools) **for past partners**

1. Organization name	2. What did we do with these partners in the past?	3. What would we possibly like to do with these partners in the future?	4. What do we want to learn more about?

Form 4 (f)—Chart summary for potential partners

Chart 1: Detail on category: ___________________________ (for example businesses, libraries, schools) **for potential partners**

1. Name of organization	2. What do we know about what they are doing?	3. What do we want to learn more about?

Form 4 (g)—Synthesis report form

Name: _________________________________ Date:__________________________

Your organization:
____

In reflecting on what you have noticed in Stage 4, please answer the following questions:

1. What surprised you?

2. What is exciting about what you found?

3. What opportunities do you see?

4. Which organizations and people are you excited about?

STAGE 5—Identify people to connect with

Form 5(a)—**Existing/past partners to contact**
Form 5 (b)—**Potential partners to contact**

Partnership building has its foundation in having different types of conversations. This means that you must provide opportunities for people to engage.

In Stage 5 team members select individuals and organizations to contact, from their list of existing and past partnerships, as well as potential new partners.

During the pilot testing of this Toolkit the participating organizations selected individuals and organizations from three of the categories they had identified during the brainstorming activities. The purpose of this was for the organizations to reach out to a few people initially, and then move to other categories as they continued this process. You may want to select individuals or organizations from a different number of categories.

Use the following forms to help you:

Form 5 (a)—Existing/Past partners to contact
Form 5 (b)—Potential partners to contact

Form 5 (a)—**Existing/past partners**

1. Identify three organizational categories you would like to begin with (for example: businesses, libraries, schools). Next identify the people (existing/past partners) you have decided to contact first.

Category	**People/Organization**
1.	
2.	
3.	

2. What were the factors that led you to select these existing or past partners to talk with first?

Form 5 (b)—**Potential partners**

1. Identify three organizational categories you would like to begin with (for example: businesses, libraries, schools). Next identify the people (potential partners) you have decided to contact first.

Category	**People/Organization**
1.	
2.	
3.	

2. What were the factors that led you to select these categories and potential partners to talk with first?

STAGE 6—Conduct exploratory interviews

Form 6 (a)—**Interview cover sheet**
Form 6 (b)—**Note taking form, existing/past partners**
Form 6 (c)—**Note taking form, new partners**
Form 6 (d)—**Meeting results summary**

During Stage 6, you will reach out to people and ask to set up one-on-one conversations. The goal of these conversations is to learn more about the organization and to share information about this process.

Start with the list of individuals your team has decided to contact first—Forms 5 (a) and 5 (b). Decide who will contact each people on the list.

Once you have divided up the work, team members will contact the individuals and ask them to either meet in person or schedule a time to talk on the phone. Interviews can take anywhere from 20 minutes to an hour. **Remember that the goal here is not to complete the form, but to build a relationship.**

> **Tip**: Think about going to the interviews in pairs so that one person can take notes. If this is not possible, take very brief notes in the meeting and then give yourself 10 minutes immediately after the interview to complete the write-up. It's hard to create a meaningful conversation with someone if you have your head buried in a notebook.

The interviews—what to ask

The guiding questions—Forms 6 (b) and (c)—are designed to be strengths-based. This means that they:

a. Focus on identifying existing resources, strengths and expertise in the community;
b. Explore what might be possible through collaboration with existing resources; and
c. Are brain-friendly. They help people come up with new information.

Strengths-based approaches are very different from traditional approaches. Traditional approaches:

a. Focus primarily on the identification of what does not exist, and then present solutions that are dependent on new funding;
b. Focus on deficit-framed questions; and
c. Focus conversations on identifying barriers and ways to overcome them, rather than exploring what is working well and what would make the biggest difference.

As a result of the traditional focus, more tends to be known about the things that aren't working. Less is known about what is working, AND what assets and resources exist that might be combined to create the desired results.

Things to pay attention to in the interviews

The goals of the meetings/conversations are to:

- Start building relationships or renew existing relationships,
- Learn about potential new partners and learn more about existing/past partners,
- See if and how others want to be involved in the future, and
- Begin to make connections and identify potential opportunities for collaboration.

Bullet points for setting up a meeting/phone call with potential/new partners:

- I would like to set up a time to talk with you about your organization and your work,
- I'm interested in learning more about what you do, and
- I'm also interested in sharing what we are doing.

Thoughts on preparing for and scheduling meetings/phone calls:

- If you don't know anyone at an organization, you can ask people that you know if they know anyone, or if they have a suggestion of who to talk to that might be interested; or you can go ahead and contact the Executive Director.
- Review any information about the organization that is on the Internet before you meet with them so you know something about what they do.

Form 6 (a)—**Interview cover sheet**

The following is a cover-sheet that can help you record your attempts to schedule a time to talk/meeting, and keep records of the people you speak with.

Name of person conducting the interview:	
Name of person being contacted:	
Organization the person represents	
Existing, past or potential partner	
Date of interview/meeting	
In person? (circle your answer)	yes no
On the phone? (circle your answer)	yes no

Form 6 (b)—**Note taking form, existing/past partners**

We have provided the following note taking form to capture the information that you gather in this conversation. You may not have time to cover all the questions. You may ask questions that come up as you talk. We've provided space for you to capture the information.

Tip: Remember, the questions are designed to be strengths-based. They are brain-friendly and help people come up with new information that could be useful when thinking about collaborating with existing resources.

1. When you think about the work of your organization, what are some of the things that you are most proud of? What does your organization do that has the most impact?

2. When you think about your success, what do you see as some of the greatest assets, resources, and strengths of your organization?

3. What do you see as the greatest strengths and resources in the communities you work in?

4. Are there any changes in your organization that we may not be aware of that are important for us to know? Any new things happening?

5. As you think about potential collaboration, are there any resources that you think could be built upon for even greater success?

6. What is your interest level in exploring new ways of partnering with us?

7. How interested would you be in participating in a future conversation with other organizations about collaborating?

8. Any suggestions of others that we should talk with? They can be people affiliated with organizations or individuals who are passionate about collaboration.

9. Other questions?

Reflecting question for interviewer:

After you've finished talking with the person, please think about your experience and what you learned.

- Did anything surprise you?
- Do you see any possibilities for partnering?
- How did it go compared to how you thought it would go?

Form 6 (c)—**Note taking form, new partners**

We have provided the following note taking form to capture the information that you gather in this conversation. You may not have time to cover all the questions. You may ask questions that come up as you talk. We've provided space for you to capture the information.

Tip: Remember, the questions are designed to be strengths-based. They are brain-friendly and help people come up with new information that could useful when thinking about collaborating with existing resources.

Part 1: Exploratory questions about the person/organization.

1. What is your primary mission and your vision for your work in the community?

2. What do you do?

3. What are some of the things you are most proud of or most excited about in your work?

4. What do you do that has the most impact?

Tip: At this point, you can share something about the resources and assets you bring to the community, (for the county health departments it was knowledge about health and health education, history of work in the community around tobacco, skills in partnering etc.) You can share that you are currently looking at finding other people and organizations who are interested in partnering to reach shared goals.

Part 2: Interest in or ideas about collaboration

Then find out some more about their assets and resources if it hasn't come in the earlier questions, i.e. ways they communicate with others, partnerships they may be involved in or interested in making, knowledge they want to share with the community, etc. Find out about their interest level in future partnerships or meetings, and see if they have any suggestions about who you can talk with that might be interested. Questions such as:

5. How interested would you be in participating in a future conversation with other organizations around collaborating to promote shared goals?

6. Do you see any connections between your work and ours?

7. Any suggestions of others that we should talk with? They can be people affiliated with organizations or individuals who are passionate about collaboration.

8. Other questions?

Reflecting question for interviewer:

After you've finished talking with the person, please think about your experience and what you learned. Did anything surprise you? Do you see any possibilities for partnering? How did it go compared to how you thought it would go?

Form 6 (d)—**Meeting results summary**

This form is designed to capture significant findings or activities that happened during the Stage 6 conversations. Please capture anything that you'd like to share that has happened related to developing collaborations with existing or potential partners.

Please list significant findings or activities here:

STAGES 7—Determine next steps

Form 7—**Collaboration steps**

There are many ways that successful collaborations can begin, grow and create impact. Here are some simple steps to consider when launching a collaboration:

- **Step 1:** Identify people with a shared interest who want to take action.
- **Step 2:** Frame a shared goal for this group. This goal should be wide enough to include a large group.
- **Step 3:** Identify champions who can provide support that will lead to shared action.

Step 1: Identify people with a shared interest who want to take action

Guiding question during this step:

- Who wants to make a change or do something about this shared interest?

Step 2: Frame a shared goal for this group. This should be wide enough to include a large group

Guiding question during this step:

- How can the shared goal be framed in a way that will increase the likelihood of attracting others? For example, if a goal is framed too narrowly, i.e. smoking cessation, there will be fewer opportunities to partner than if the goal is framed more widely, such as increasing health outcomes.

Step 3: Identify Champions who will provide support which will lead to shared action

Guiding questions during this step:

- Who will step up to provide organizational support to this effort/group?
- What strengths and resources do the people with the shared goal bring to the table?
- What could possibly be done, by connecting existing resources, to make progress toward the shared goal?
- Are there additional resources (from potential new partners or other sources) that could be dedicated to the shared goal?

STAGE 8—Partnership development and community conversations

Using whole system methods

There are many ways that community conversations can be convened.

There is a range of strengths-based facilitation methods that can be used to assist individuals to think creatively about what they most want to see. These methods can guide discussion around leveraging what currently exists to create impact. We like to use whole system methods, such as Appreciative Inquiry, Open Space Technology, and the World Café. We have used these during the pilot testing of this Toolkit with the staff from the county health departments.

Whole system methods adhere to the following common principles, which lead to their success:

1. **Maximize engagement—**Structure participation opportunities that allow for conversation in pairs and small groups before reporting back to the large group. This leads to high engagement and full participation. Traditional meetings often limit participation to saying something in front of the whole group. Only a small percentage of people will participate in these circumstances.
2. **Focus on strengths—**Focus the attention on existing strengths and connections to shared goals. This is accomplished by posing carefully constructed questions that support creative thinking and idea generation.
3. **Respect diverse learning styles—**Offer multiple ways to provide input, including writing as well as speaking. Allow for diverse learning styles. Whole system methods allow for participation in multiple ways, including writing rather than speaking and posting thoughts for gallery walks to increase participation and engagement.
4. **Stay positive—**Focus on the goal you want to reach—what you wish to create together—not the problem you wish to solve. Recent research on the brain shows that traditional deficit-focused approaches lead to: a decrease in energy among participants, a narrow range of responses, a focus on what can't be done without new funding, and solutions that are beyond the control of anyone present to implement. Changing the questions that people are asked can create an entirely different result. Focusing attention on existing strengths and desired outcomes results in: new connections and learning, identification of possibilities of actions that can be taken by participants, increase in energy, an increased ability to see the big picture, and increased efficacy.

Following these principles creates very different results from traditional meeting facilitation.

Thoughts on community conversations

Community conversations are an important process. And different processes can lead to different results. It is best to go into these conversations with the confidence of careful planning and an open mind.

The intended outcomes of the community conversations are to:

- **Develop and implement** strategies to achieve a shared vision,
- **Reflect on success** and learn continuously, and
- **Continue to expand** and develop new partners.

Community conversations could begin by addressing the following:

- **The development or expansion of partnerships**—are the right people in the room? Who else might need to be involved?
- **Creating a shared vision—**is the group in agreement about the large goal? Is it something they can get behind? Does it help them move closer toward fulfilling their organizational missions?
- **Connecting existing resources to the vision—** by focusing on what can be done with existing resources, the group will develop sustainable activities, which can be initiated and continued without adding resources or waiting for new funding.

Tip: A small step, or series of steps, that can be quickly taken together build confidence. It also means that the group is not in a holding pattern waiting for new resources (like the funding of a grant proposal).

Tip: The use of whole system methods is very different from traditional facilitation methods. We recommend using a facilitator who has been trained and has experience using whole system methods.

The 6 Secrets of High Engagement Presentations

Wholonomy Press

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CONTENTS

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FORWARD

We wrote this e-book because it's the book we wish we could have read when we started presenting. Although there are some very good books out there that can help with presenting, they can often seem overwhelming, and you may finish reading and still be unclear about how to make one small change at a time.

What we hope to do with this e-book is inspire people who want to make their presentations more interactive and support them in trying something new. While we call this e-book **The Six Secrets of High Engagement Presentations**, it's unlikely that anyone will want to try to take on and implement all six secrets at once, the first time around. The way most people learn is by making one small change, and then adding another small change onto that. It is through this process that, over time, major changes happen.

Wherever you start making change is the right place. We've tried to give you simple and easy ways to try some different approaches and strategies that won't require large amounts of preparation time.

We'd love to hear from you about your experiences, and we're happy to respond to any questions.

Who we are:

Ms. O'Neill applies strengths based approaches to change in her work with individuals and groups. She is passionate about activating positivity, building resiliency, and creating conditions for authentic learning, growth, and collaboration. She blends her experience working in large systems, her knowledge of best practices in system change, experience teaching and using coaching skills and whole system methods such as Appreciative Inquiry, with her knowledge of the brain research and learning. Each one of us is born loving to learn and is an expert in the creative process. Ms. O'Neill helps individuals and groups rediscover their creativity, love of learning, and intuitive voice.

Ms. Griffiths applies strengths based approaches to change, whether the change is at the individual, organizational, collaboration or system levels. She helps to create processes and conditions for supporting change, and blends her knowledge of brain research, coaching and best practices in systems change with whole system methods, such as Appreciative Inquiry, World Café and Open Space Technology. All of us can change and grow. Ms. Griffiths, once a teacher, now brings the lens of learning to focus on creating positive change.

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SECTION I
Introduction

We once heard a presenter in the field of early childhood say, "I just don't know if the people in this room can learn anything." Although she was obviously frustrated, this quote draws attention to a couple of issues we need to pay attention to when presenting:

1. Everyone has the capacity to learn. *How can we present in a way that supports learning?*
2. We often blame individual people when they struggle with the materials presented, like our presenter blaming the participants in her training. *How can we present in a way that benefits multiple individual learning styles and speeds?*

This e-book has been designed to help people who present information to groups answer these questions. It has been designed by drawing on two major resources—our combined 40 years of presenting experience, and what the research says about the brain and the way people learn. We have taken our findings from these resources and through them created **The Six Secrets of High Engagement Presentations**.*

*All sources referenced in this e-book are listed in Section VII—References and Additional Resources.

SECTION II
What you need to know before getting started

Before we move on and explain the Secrets, it is important to understand a few fundamentals:

- **What is the traditional lecture style of presenting?**
- **What is learner-centered presenting?**
- **What are the key differences between the traditional lecture style and learner-centered presenting?**
- **Why is the learning environment important?**

What is the traditional lecture style of presenting?

The traditional presentation style that many of us grew up with could be called a lecture style—the presenter is an "expert" who lectures (often using PowerPoint). It is characterized by the following:

- The expert conveys the knowledge.
- Questions, if and when they are asked, are asked by individuals and answered in the whole group setting.
- There is little time for processing.
- There is little participant engagement.
- The presentation style is "information driven"; the main function of a traditional presentation is to convey information.
- At the end of the presentation, class or lecture series, an evaluation is given that asks people to rate different aspects of the presentation using numerical ratings.

The traditional lecture style is designed based on the assumptions that all people learn the same way and that the lecture style is sufficient for knowledge transfer and application. However, new research invites us to explore these assumptions. We now know that traditional methods of presenting are not well aligned with how the brain works. Our brains have a hard time listening for long periods of time. PowerPoint doesn't help. In fact when we pause for a moment and think about the traditional lecture style, we can see that it is information driven, not learning driven; the goal of the lecture is to transfer a set amount of material from the head of the expert to the head of the learner. The goal is not to maximize understanding or retention.

Ever hear the saying in "one ear and out the other"? That's what happens in many lectures.

What is learner-centered presenting?

Learner-centered presenting is the sharing of materials in a more meaningful and impactful way. For deeper learning, engagement strategies must be used that:

- Create opportunities throughout the presentation for participants to engage with the material and each other, to make meaning of what they are learning, and to connect it to what they already know.

- Take into account the different learning styles in the room—Auditory, visual, and kinesthetic.
- Take into consideration what we now know about how the brain works—Recent brain research has revealed that when people are stressed or anxious they cannot access their higher level thinking skills. During times of stress, chemicals are released in the brain. These chemicals prevent access to the neo-cortex, where higher-level thinking takes places. We think best and learn best when we are engaged, but not stressed.
- Allow time for rest and reflection—Insights require a quiet mind. The working memory (required for change and new learning) takes more energy than doing routine things. The higher level thinking part of the brain is "metabolically expensive" to run—it takes a lot of energy. When your brain is tired you lose focus and need to take a break—refueling is an important part of learning.
- Do not overload the participants—Because of the limits of working memory only seven pieces of information should be presented before participants have a chance to process the information; no more than five in highly technical presentations. Plan to have processing time every 10 minutes of presenting time. This will lead to increased learning and retention.
- Allow for people to engage with materials as learners, drawing attention to the four stages of learning:
    - Unconscious incompetency—I don't know I don't know
    - Conscious incompetency—I know I don't know
    - Conscious competence—I know, but I have to think about it
    - Unconscious competency—I know it so well I don't have to think about it
- Align with what is known about skills acquisition— A second model of skill acquisition is the Dreyfus model. In this model there are the following five stages: novice, advanced beginner, competent, proficient, and expert. There is a period of time in which skills develop. There is no way to skip to expert the first time you try a new skill or behavior.

Learner-centered presenting takes more planning and design up front. It also takes willingness on the presenter's part to do things that may be new for them. We invite people to think of presenting as facilitation, rather than lecture. You are a facilitator of learning, supporting your group of participants in engaging in new learning.

What are some key differences between traditional presentation approaches and learner-centered approaches?

The presentation design process described in this e-book and the outcomes achieved are aligned with and were informed by the following:

- Positive psychology and neuroscience research about how to create positive sustainable change. We make this connection because adult learning often requires changing the way we think.
- Accelerated Learning (A.L.), "a total system for speeding and enhancing both the design process and the learning processes." It is based on the latest brain research and builds upon the way we all naturally learn (The Center for Accelerated Learning, www.alcenter.com).
- Strengths based approaches that promote resiliency and build on strengths rather than traditional deficit approaches.
- Carol Dweck's work studying the growth and fixed mindsets. A person believing that we each have the capacity to change, grow and learn, that the brain is like a muscle, characterizes the growth mindset. People with a fixed mindset believe abilities are basically static, that we may just not be the type of person who can dance, or sing, or be positive, for example.

Growth Mindset	Fixed Mindset
People with a growth mindset stretch themselves. They tend to take risks, accept feedback, and take the long-term view. They are comfortable with the type of failure required to learn a new skill—not failure in the final outcome, but failure along the way.	People with a fixed mindset tend to avoid challenges. They may feel threatened by feedback and can't stand the type of failure that is necessary when trying something new or learning something.
People who have a growth mindset believe that abilities are like muscles; they can be built up with practice. With a growth mindset, people tend to accept more challenges despite the risk of failure.	People who have a fixed mindset believe that their abilities (and those of others) are basically static. They believe that your behavior is a good representation of your natural ability

The goal of learner-centered approaches is that people "get it". That they are able to apply, use and retain the knowledge. Using this approach may mean that less content is covered, but the content you cover will stick.

Why is the Learning Environment Important?

The learning environment matters and can have an impact on learning outcomes. According to the Center for Accelerated Learning (www.alcenter.com) the following components cultivate an "optimal learning environment":

A Positive Learning Environment. People learn best in a positive physical, emotional, and social environment, one that is both relaxed and stimulating. A sense of wholeness, safety, interest, and enjoyment is essential for optimizing human learning.

Total Learner Involvement. People learn best when they are totally and actively involved and take full responsibility for their own learning. Learning is not a spectator sport but a participatory one. Knowledge is not something a learner passively absorbs, but something a learner actively creates. Thus A.L. tends to be more activity-based rather than materials-based or presentations-based.

Collaboration Among Learners. People generally learn best in an environment of collaboration. All good learning tends to be social. Whereas traditional learning emphasizes competition between isolated individuals, A.L. emphasizes collaboration between learners in a learning community.

Variety That Appeals To All Learning Styles. People learn best when they have a rich variety of learning options that allows them to use all their senses and exercise their preferred learning style. Rather than thinking of a learning program as a one-dish meal, A.L. thinks of it as a results-driven, learner-centered smorgasbord.

Contextual Learning. People learn best in context. Facts and skills learned in isolation are hard to absorb and quick to evaporate. The best learning comes from doing the work itself in a continual process of "real-world" immersion, feedback, reflection, evaluation, and reimmersion.

Source: www.alcenter.com

SECTION III
The Why, the Who, the What

Using **Six Secrets of High Engagement Presentations** will only be successful if you do your homework first. We call this pre-planning—what you need to think about before you apply the **Six Secrets of High Engagement Presentations**.

This pre-planning description is followed by a summary chart that asks prompt questions. It will help you track your answers and make sure you're ready to apply the **Six Secrets of High Engagement Presentations**.

Pre-Planning—What you need to know before you begin to plan:

Your first job as a presenter is to clarify:

1. **The Why—the purpose of the presentation**
   Understand the motivation. The questions to ask are as follows: Have participants been told to attend or are they self-selected? Why are resources being committed to this? Who made the decision to apply the resources, is it the people in the presentation or someone else? What is the motivation to pay for it or make time for it?

2. **The Who—who will be attending**
   Know your audience. The questions to ask are as follows: How many people? Who is attending? What is their experience? What are they coming to learn? How will they be able to use this information? Are they being required to participate or is it voluntary? What languages do they speak? What are their literacy levels? What is the diversity among participants? What do they already know about this topic? What misconceptions might they have?

   Some presenters survey their audience in advance, asking them these questions via survey monkey or at a meeting. Sometimes, it isn't possible to do this because you don't know who will be coming, like when you present at a conference. The best presentations meet people where they are, and this is easiest when you know who is in the audience and what they already know.

3. **The What—the learning outcomes for the presentation**
   Clarify the expectations. The questions to ask are as follows: What is the purpose of the training/presentation? What would a successful presentation look like? Who has had input? What do participants need to leave having, knowing or feeling (learning goals or outcomes)? Who is determining these learning goals or outcomes? How will participants be able to use the information? What is their work situation or context? Where will the information learned be applied?

   Before you design your presentation, you need to know what you want people to leave with. These are your learning goals. The learning goals for this e-book could be as follows:

Learning goals/outcomes: e-book participants will:

- Examine mental models of presenting (In the words of Peter Senge: "Mental models are deeply held internal images of how the world works, images that limit us to familiar ways of thinking and acting.")
- Learn **The 6 Secrets of High Engagement Presentations**
- Process the new learning and develop ideas on how to start using **The Six Secrets of High Engagement Presentations**

Pre-planning summary

The table below has been designed to help you through the pre-planning process. By answering the questions in the boxes you will become clear on **the why, the who, and the what**. You will be ready to start planning and exploring **The Six Secrets of High Engagement Presentations**.

Questions	Answers
The Why: • Why are resources being committed to this? • Who made the decision to apply the resources, is it the people attending the presentation or someone else? • What is the motivation to pay for it or make time for it?	
The Who: • How many people? • Who is attending? • What is their experience? • What are they coming to learn? • How will they be able to use this information? • Are they being required to participate or is it voluntary? • What languages do they speak? • What are their literacy levels? • What is the diversity among participants? • What do they already know about this topic? • What misconceptions might they have?	
The What: • What is the purpose of the training/presentation? • What would a successful presentation look like? • Who has had input? • What do participants need to leave having, knowing or feeling (learning goals or outcomes)? • Who is determining these learning goals or outcomes? • How will participants be able to use the information? • What is their context; where will the information learned be applied?	

Once you have answered the why, who and what questions, you have a set of learning goals, a clear purpose and knowledge about your audience. Now you can start planning the presentation and applying **The Six Secrets of High Engagement Presentations**.

SECTION IV
The Six Secrets of High Engagement Presentations

Now that we have looked at the principles behind **The Six Secrets of High Engagement Presentations** and have spent time on the pre-planning stage, it's time to dive in.

First we will share **The Six Secrets of High Engagement Presentations.** Then we will explore activities that can be used in each secret area and ways of putting the secrets into practice.

- **Secret 1: Focus/activate positivity**
- **Secret 2: Share learning goals**
- **Secret 3: Activate prior knowledge**
- **Secret 4: Deliver new content in an interactive manner and with processing time**
- **Secret 5: Check for understanding**
- **Secret 6: Help participants reflect on their learning**

Once you know you're going to be presenting, you have a choice. Do you plan a lecture with power point slides, or develop a plan to start using **The Six Secrets of High Engagement Presentations** and become a high-impact presenter? The choice is yours.

The Six Secrets and ways to do them

The beginning of the presentation—Secrets 1, 2 & 3

Secret 1: Focus/activate positivity

At some point you want to activate positivity within the group, the earlier this can be done the better. Begin your presentation with an activity that helps people clear their minds and focus on the learning.

Ways to do this:

- **Strategy A**—Have participants interview each other in pairs using an Appreciative Question. Appreciative Questions help people connect to a positive experience and success. For example, an appreciative question on the topic of presenting might be:

  > "Describe an experience when you felt that your presentation really made a difference to the people in the audience. A time when participants left feeling inspired by what they learned. What happened? What about this experience was different?"

  For a list of Appreciative Questions you can look at *Appreciative team building: Positive questions to bring out the best of your team*.

- **Strategy B**—Use cards like Daniel Levin's *Zen Cards* or Inspired Mastery's *Pause: 52 Ways to Shift Any Outcome in Less Than a Minute Cards.* There are many possible card sets on the market and many bookstores carry a selection. Invite people to take a card, read it, and make a connection between the words on the card and the subject of the presentation. People can then share as a whole group, small group, or in pairs.

- **Strategy C**—Have people share a quality they are bringing to the presentation. We have heard people say openness, flexibility, courage, joy. The list is endless.

Secret 2: Share learning goals

When you complete the pre-planning activities one outcome is a set of your learning goals for the group. However, it is important also to understand the expectations of the participants. What would make this presentation successful from their perspective? The following four-step process will enable you, as the presenter, to hear participant's learning goals and to assess whether the agenda you have planned will meet their needs (it's better to know this at the beginning than the end!).

- The Learning goal 4-step process:
    1. Share your learning goals for the group (on a white board, black board, flip chart sheet, handout, or Power Point).
    2. Allow people time to individually identify their own learning goal for the presentation (what would make it a good use of their time, what would they leave knowing, feeling or having, what would make this the best presentation from their perspective?). Each participant writes their individual goal on an index card or sticky.
    3. Have participants share their goal. This can be sharing with a partner, in a small group or the whole group, depending on how many people are in the group. Once the presenter has heard the individual learning goals and has put them on a flip chart for everyone in the room to see (if possible), it is time to share back to the group how the individual goals align with what was planned for the presentation. Here there are three possible scenarios:
        - First, there is alignment between what people said they wanted and what is planned. This is most often the case and it is great to be able to this share back with a group.
        - Second, there is a relatively small difference between what is planned and what people want, and the presenter feels able to make the necessary adjustments.
        - Third, there is a big difference between what was planned and what people want and the presenter can't adjust. In this case, it is very important to be clear to the group, and the faster this discrepancy is identified and clarified, the better. When possible, it is helpful if the presenter can identify a person, process, or time that will allow the group to get what they want. Clearing this up quickly can help people be able to focus on what you had planned.

Secret 3: Activate prior knowledge

Activating prior knowledge means allowing people time to think about and share what they already know about a topic. This helps the presenter to learn more about the current level of knowledge, and helps the participants prepare to connect new learning with what they already know.

Ways to do this:

- **Strategy A**—Invite people to share something they know about topic X with a partner. Pairs can then share with the group.
- **Strategy B**—If you have tables in the room, ask small groups to make flip charts listing what they know about topic X, and what they want to know about topic X.
- **Strategy C**—Put two charts up on the wall—what we know about X and what we want to know about X. Have people write what they know and want to know on small stickies and then invite them to post them on the wall charts.

- **Strategy D**—Ask participants to share and examine beliefs and assumptions about the topic. Give each participant a small sheet of paper or index card. Ask them to write either a belief about (topic X) or an assumption about (topic X). These can be shared either in pairs, or small groups, or cards from one group can be swapped with those from another, with each group reviewing the new set of cards and reflecting on the implications of those.

The middle of the presentation—Secrets 4 & 5

Secret 4: Deliver new content in an interactive manner and with processing time

Research shows that if you stop delivering new material every 10 minutes and let people talk for 2 minutes about what they're hearing and their thinking, the learning and retention will greatly increase. This is the easiest way to start making changes to how you present. There are many ways to deliver new content in a more interactive way. What follows are four of our favorites:

Ways to do this:

- **Strategy A—Posters for a gallery walk**: Making posters in advance with the content you want delivered allows a gallery walk to be used to deliver information. The advantage is that it is very engaging. Display the posters around the room and invite people to walk from poster to poster (activating kinesthetic learning), look at posters, which have different colors, images or shapes (activating visual learning), and use stickies to write questions and comments to put on the posters. Using the gallery walk allows people to see how others are responding to the information, as well as sharing their personal responses. If you can play music while people are doing this you can also activate auditory learning.
- **Strategy B—Develop a quiz** (can also use for checking for understanding): We developed a quiz on presenting that we've used both to deliver content and to check for understanding. There is room on the Quiz sheet for two answers, and we give instructions for people to ask two other people what they think the answer to each question is. When the group has their sheets full, we ask the group to share the answers they heard. Using this method means that no one feels defensive, because they don't have to share what they think. For each question we write all the answers heard on a flip chart, so everyone can see. When all the answers to a given question are heard and written up, we reveal the answer. Often there is one specific correct answer, like a number. When this is the case we circle it on the flip chart. People often gasp when the answer is different from what they thought. An example of this is a quiz we developed for teaching about grants. One question in the quiz asks what percent of submitted grant proposals are funded. Generally people in the training offer a range of answers, suggesting that somewhere between 10% and 50% of grant proposals are funded. 50%! The actual average is 5%. This reveals some important assumptions that are being made.

  Appendix A shows an example of a quiz we developed about presenting. It includes the question and answer sheets. You can use it as is or as a template to develop your own quizzes.
- **Strategy C—Have participants read and reflect** (participants read the same content): We often have participants read some resource document in small chunks, a paragraph at a time or a page at a time, and then give them a chance to talk to someone sitting next to them about what they read. This allows the group to read and process new information.
- **Strategy D—Have participants read different content and share learning** (Jigsaw): If the content is larger and more complex, then splitting it up and having people read different parts is useful. For example, we have done this with a framework on system change. We split the large group into smaller groups and give each group one section to read about, discuss, and make a poster to

share with others. You can have people share with the whole group through a gallery walk and/or presentation, or have people form new small groups with one “expert” from each content chunk to share what they learned.

However you choose to deliver your content, a complete and full set of all materials, including sources, should be emailed, or a hard copy given, to all participants. This allows participants to refer back to the materials and extend their learning independently, should they choose.

Secret 5: Check for understanding

Checking for understanding is essential and finding out what the group understands is critical before moving on to more complex or new material.

Ways to do this:

- **Strategy A**—You can have people summarize their learning on posters and present them to the group.
- **Strategy B**—Use the quiz strategy and have people share what they heard.

The end of the presentation—Secret 6

Secret 6: Help participants reflect on their learning

Reflection allows us to own new knowledge. It is the glue that helps us to connect new knowledge to what we already know, and to our world. Reflection also helps us think through application and cements the thinking process, thereby helping us to access new knowledge in the future. Reflection builds learning.

Ways to do this:

- **Strategy A**—Have people process individually, in pairs, or small groups what they are taking away.
- **Strategy B**—If you want to know what they are taking away you can have them make posters and do a gallery walk or present to the group.
- **Strategy C**—Use an individual reflection temple (Appendix B)

The following **The Six Secrets of High Engagement Presentations Organizer** has been designed to help you explore how the Six Secrets can apply to your next presentation.

The Six Secrets of High Engagement Presentations Organizer

Now you are familiar with the **Six Secrets of High Engagement Presenting** use the following organizer to help you apply them to your next presentation.

Secret 1: Focus/activate Positivity
How could I do this?
Secret 2: Share learning goals for the group and allow people to identify their own
How could I do this?
Secret 3: Activate prior knowledge
How could I do this?
Secret 4: Deliver new content in an interactive manner and with processing time
How could I do this?
Secret 5: Check for understanding
How could I do this?
Secret 6: Help participants reflect on their learning
How could I do this?

SECTION V
Putting it all together

The following High Engagement Presentation Planning Sheet puts together **the why, the who, the what** and **The Six Secrets of High Engagement Presentations.** Use it to plan your next high engagement presentation.

Presenting Planning Sheet

Purpose of presentation: ______________________________

Total time available: ______________ Number of people attending: ______________

Consider the purpose of the presentation (refers back to the "Why" section):
Consider this particular group of learners/participants (refers back to the "Who" section):
Learning Outcomes for Group (refers back to the "What" section):

Presentation Component	**Things to think about related to this presentation—i.e.. Time, size of room, etc.**	**Ideas for engagement or learning strategy for this section—pairs, small groups, processes, report outs. See list of options in Appendix C.**
Welcome and introductions	Who will speak first and welcome? What context setting would be useful? How will introductions be done? How many people will be there? How much time is there available for this?	
Secret 1: Focus/activate positivity	How much time is there available for this? What other strategies are planned so far?	
Secret 2: Share learning goals – The four stages of the learning goals process	How much time is there available for this? How will I do it?	
Secret 3: Activate prior knowledge	How much time is there available for this? What other strategies are planned so far? What are participants likely to know? What assumptions, beliefs, and mental models will be in the group?	
Secret 4: Deliver new content in an interactive manner and with processing time	How much time is there available for this? What other strategies are planned so far?	
Secret 5: Check for understanding	How much time is there available for this? What other strategies are planned so far?	
Secret 6: Help participants reflect on their Learning	How much time is there available for this? What other strategies are planned so far? What documentation of the reflection process might be useful?	

Notes:

SECTION VI
Next steps

Now that you have completed this e-book we hope that you will be able to begin to put **The Six Secrets of High Impact Presentations** into practice. What we have shared are first steps that a presenter can take to make their presentations more engaging. This is not, of course, an exhaustive account of every strategy that could be used, but rather an introduction to some tried and tested presentation strategies. We hope you will enjoy putting them into practice.

The appendices that follow include additional materials and a reference list for you to extend your knowledge.

Please do contact us and let us know how your presentation practice changes. We'd love to hear from you.

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Sarah Griffiths • slmgriffiths@hotmail.com or 520 271-7970

We offer workshops and webinars on how to increase engagement in presentations and meetings. Here's what three people shared after attending our **Six Secrets of High Engagement Presentations Workshop:**

> One participant shared that after using Secret 2, Share Learning Goals, she found that everyone in the room became engaged, including a man who was just going to wait for the workshop to be over so he could go grocery shopping with his wife. During the course of her presentation, people continued to share, and she gave us several examples of how people in the group talked about their experiences, knowledge, and resources with other participants. She also added that by changing her own mental model from "expert presenter" to "facilitator of learning", she unlocked her own resources. She was then able to share these with the group. Just using one of the Six Secrets completely changed her experience of presenting.
>
> Another participant described her experience and learning at the presenting workshop as "transformational". She began the workshop feeling afraid of presenting, because she defined it as public speaking. After realizing that she could reframe "making a presentation" to "facilitating learning", she felt completely differently. This one-day workshop allowed her to shift her own thinking so dramatically that in the closing reflection and evaluation she said, "I feel transformed".
>
> Finally, one participant shared, "I'm not going to give two hour lectures anymore."

SECTION VII
Appendices

Appendix A: Quiz: what do you think about presenting?

Walk around the room. For every question find two different people to give you an answer. Record the answers. Try to get answers from as many different people as possible. Have Fun!

Question	Answer for Person # 1	Answer for Person # 2
Question 1. What % of what people learn in training ever gets applied on the job?		
Question 2. What is the least effective way to convey information to people in a presentation?		
Question 3. What is the most effective way to convey information to people in a presentation?		
Question 4. When is the peak time of retention for someone attending a training?		
Question 5. What % of people are visual and kinesthetic learners?		
Question 6. What is the maximum time that the brain can work hard at a stretch without a break?		
Question 7. What is the biggest impediment to new learning?		
Question 8. What % of communication is the actual words?		

Resources used:

The Presenters Fieldbook: A Practical Guide
The 7 Levels of Change: Different Thinking for Different Results
Implementation Research: A Synthesis of the Literature

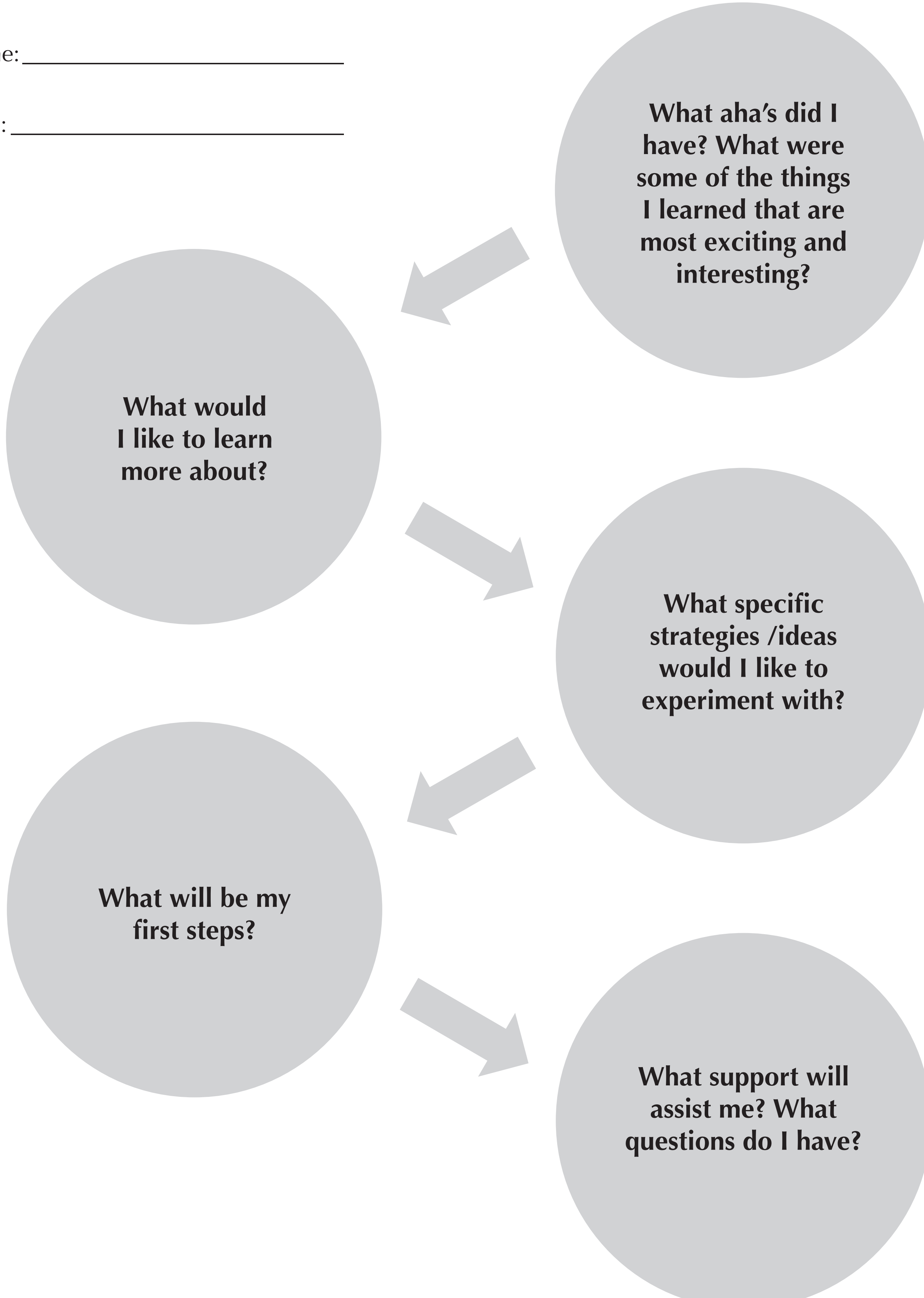
What do you think about presenting? Answer sheet

Question	Answer and Reference
Question 1. What % of what people learn in training ever gets applied on the job?	Ten percent of what is learned in training is used on the job. The National Implementation Research Network's Monograph, *Implementation Research: A Synthesis of the Literature,* Wallace 2005
Question 2. What is the least effective way to convey information to people in a presentation?	Trick question. It depends on the learning style, but we know that almost 90% of people are visual and kinesthetic learners, so lecture won't be very effective for them. www.makemark.com
Question 3. What is the most effective way to convey information to people in a presentation?	Trick question. It depends on the learning style. www.makemark.com
Question 4. When is the peak time of retention for someone attending a training?	The five minutes right after the presentation. *The 7 Levels of Change: Different Thinking for Different Results*
Question 5. What % of people are visual and kinesthetic learners?	Almost 90%. www.makemark.com
Question 6. What is the maximum time that the brain can work hard at a stretch without a break?	20 minutes. From a podcast called the The Neuroscience of Leadership. *Podcast, http://www.guerrillaprojectmanagement.com/leading-projects-with-the-brain-in-mind-the-neuroscience-of-leadership*
Question 7. What is the biggest impediment to new learning?	Incorrect information that people think is correct. *The Presenters Fieldbook: A Practical Guide*
Question 8. What % of communication is the actual words?	7%. *Cognitive Coaching Foundation Seminar: Learning Guide* (eighth edition)

Appendix B: Reflection template

Name: ____________________________

Date: _____________________________



Appendix C: Menu options of learning and engagement strategies

Secret 1: Focus/activate positivity
Strategy A – appreciative question Strategy B – using cards Strategy C – sharing a quality
Secret 2: Share learning goals for the group and allow people to identify their own
Participants identify individual learning goals and can share goals - in pairs, small groups, or with the whole group
Secret 3: Activate prior knowledge
Strategy A – partner share Strategy B – tables make flip chart Strategy C – whole group posts stickies Strategy D – surface assumptions/beliefs
Secret 4: Deliver new content in an interactive manner and with processing time
Strategy A – posters for gallery walk Strategy B – develop a quiz Strategy C – read and reflect same material Strategy D – jigsaw
Secret 5: Check for understanding
Strategy A – make posters to summarize learning Strategy B – develop a quiz
Secret 6: Help participants reflect on their learning
Strategy A – partner share Strategy B – make posters and share Strategy C – reflection template

SECTION VII
References and additional resources

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Handout - Learning Jigsaw

Small Groups of 5:

Person 1—What is Collective Leadership? (Page 2)

Person 2—Key Conditions for Collective Leadership (Page 3)

Person 3—Principles of Collective Leadership (Page 4)

Person 4—Structures that Enhance Collective Leadership (Pages 5 and 6)

Person 5—Practices that help foster collective leadership (Page 7)

When all members of a group have finished reading their sections, they share with each other what they read.

Collective Leadership

Person 1—What is Collective Leadership?

Leadership can be defined as speaking, listening, and acting in a way that enables an organization or community to address its challenges and opportunities. Collective leadership is, simply stated, leading together as partners. Unlike heroic leadership, collective leadership embraces the diversity of people and perspectives and frees up self-initiative and collective intelligence. When practiced across sectors, it creates the conditions for societal learning and innovation through an increased sense of interdependence and a deeper trust in self-organization." (Gauthier)

Collective leadership can be transformative, enabling each co-leader to grow personally while generating benefits for the whole. This is only possible when partners are committed to both support and challenge each other, so that optimal learning conditions exits within the partnership. (Gauthier)

Traditional approaches to leadership and leadership development assume that training an individual leader with appropriate knowledge and skills will lead to community change. However, this is not scalable. We will not reach the scale of change we seek developing one leader at a time. To support leadership that results in transformational changes, we need to focus on how individuals and groups are connecting, organizing, thinking systemically, bridging and learning as a dynamic leadership process that mobilizes action on the scale needed to address the inequities and injustices we care about. (Leadership for a New Era, *A New Leadership Mindset for Scaling Social Change)*

Collective leadership becomes possible when the members of a group, motivated by a common purpose, begin to build relationships with each other that are genuinely respectful enough to allow them to co-construct their shared purpose and work. This is about expanding from the solo perspective of "I" to include the "We". (Kellogg)

Classical and shared leadership compared	
Classical leadership	**Shared leadership**
Displayed by a person's position in a group or hierarchy.	Identified by the quality of people's interactions rather than their position.
Leadership evaluated by whether the leader solves problems.	Leadership evaluated by how people are working together.
Leaders provide solutions and answers.	All work to enhance the process and to make it more fulfilling.
Distinct differences between leaders and followers: character, skill, etc.	People are interdependent. All are active participants in the process of leadership.
Communication is often formal.	Communication is crucial with a stress on conversation.
Can often rely on secrecy, deception and payoffs.	Values democratic processes, honesty and shared ethics. Seeks a common good.

Drawing from material in Gloria Nemerowicz and Eugene Rosi (1997) *Education for Leadership and Social Responsibility*, London: Falmer Press. Page 16.

Person 2—Key Conditions for Collective Leadership

- **Individual intention**—Co-leaders commit to mutual respect, transparency and learning, and are willing to surface and challenge their assumptions and adopt a win-win-win perspective.
- **Individual behavior**—Partners genuinely listen and give helpful feedback to one another, and respect jointly defined ground rules and honor their commitments.
- **Culture**—The collaboration is characterized by shared values and vision, perceived complimentary viewpoints and skills, open and frequent communication, search for synergy and a long-term view.
- **Structure**—The collaboration structures and systems include concrete common goals and priorities, behavioral ground rules, agreed upon measures of impact, shared benefits and rewards, clear accountability and shared responsibility for the whole (Gauthier).

Successful collaborations are values driven and require from all partners a commitment to a larger goal, involvement of the heart, willingness to communicate and cooperate across boundaries, creativity, courage, perseverance, accountability and collective responsibility for the whole. (Gauthier)

The Collective Leadership Process

The process of collective leadership begins with a shared dream that forms in the heart of a group of passionate individuals with diverse skills. As relationships are formed around a shared purpose, the group creates a common awareness of challenges and develops ownership of creating new solutions/challenges. This type of leadership engages participants in activities that can effect sustained and systemic change. It connects those who are often seen as "outside" of an institution to those who are on the "inside." (Kellogg)

This type of leadership means being willing to be pushed and pulled as a result of being in a relationship with others who share the same dream. It means developing group and individual potential. It means finding what will be most effective in making needed changes in a specific time and place. (Kellogg)

Building collective leadership is a cyclical process; it does not happen once and end. Instead, it continues evolving as the work changes. As groups grow and move, they continue to learn and relearn. (Kellogg)

Person 3—Principles of Collective Leadership

- Collective leadership is relational: the group as a whole is a leader, with members within the group being leaders within the group.
- Collective leadership is fluid: it emerges out of specific situations, the process of defining vision and setting direction, as well as exercising influence over other people and organizations; it becomes a shared function of the group.
- Collective leadership is transformational; it begins with a belief in and a commitment to social advocacy and social justice. (Kellogg)

Developing Collective Leadership

- All those involved must be genuinely open to learning and willing to change themselves.
- Those who succeed take the time to learn about the community and its cultures and diversity.
- It is critical to build trusting relationships.
- It is important to involve as many members in the direction-setting process as possible and find ways to handle membership changes easily.
- People new to community-change need hands-on opportunities to learn tactical leadership skills. (Kellogg)

Collective Leadership multiplies the skills and attributes of others

Individuals who act as Multipliers develop the leadership of those around them and so can be instrumental in developing collective leadership.

The Five Disciplines of the Multiplier

Diminisher		Multiplier	
The Empire Builder	Hoards resources and underutilizes talent	The Talent Magnet	Attracts talented people and uses them at their highest point of contribution
The Tyrant	Creates a tense environment that suppresses people's thinking and capability	The Liberator	Creates an intense environment that requires people's best thinking and work
The Know-It-All	Gives directives that showcase how much they know	The Challenger	Defines an opportunity that causes people to stretch
The Decision Maker	Makes centralized, abrupt decisions that confuse the organization	The Debate maker	Drives sound decisions through rigorous debate
The Micro Manager	Drives results through their personal involvement	The Investor	Gives other people the ownership for results and invests in their success

Person 4—Structures that Enhance Collective Leadership

- Clearly defined and frequently articulates roles and responsibilities.
- Transparent distribution of resources.
- A set of defined expectations that hold each member accountable to one another and the overall project goals.
- Open avenues of communication across all levels.

Elements of Collective Leadership

According to the Leadership for a New Era Evaluation Learning Circle, there are visible attributes of collective leadership (*Elements of Collective Leadership*).

	Expect to See	Like to See	Love to See
Understandings about "I" to "We" Shift	• Group identity and bonding • Buy-in to facilitated process	• Beyond group bridges • Group ownership of leadership role	• Inclusive of other stakeholders • Linking • Internalization of self-organization • Flow of lead and follow roles
Shared Vision, Purpose and Responsibility	• Shared vision • Shared language	• Rich conversation • People share a calling • Emerging clarity around action • Alignment around purpose • Shared ability to set direction • Refine the vision	• People prepared to face a broad range of challenges • Synergy around purpose • Everyone welcomes responsibility and accountability
Leadership Compact (Values, Awareness, and Capacities)	• Respect • Open dialogue • Tolerance for difference	• Trust • Value differences • Accountability to the group • Holding each other accountable for process	• Reflective practice valued • Holding each other accountable for results • Social intelligence
Power, Oppression, and Healing	• Participants know they do not start from the same place • Opportunity to learn/understand • Power dynamics/leadership roles change	• Move from understanding to behavior • Recognize and name issue/conflict/pain • Traditional power leaders step back • "Non traditional" leaders take on leadership roles	• Move from behavior to transformation • Address issues of power directly • Traditional leaders intentionally share/give up leadership • Active healing

	Expect to See	Like to See	Love to See
Group Process and Decision-Making	• Group makes decisions about moving forward that resonates with all • Assumes value of collective leadership	• The group respects experimentation and learning from failure • Shared responsibility for process and decision making • Integrated and interdependent	• Group enters into a shared space of deep reflection and listening • Meetings flow and are purposeful • Members intuitively know when, where, how to apply their skills for the common good • No one makes it happen, it's like an orchestra/jazz jam • Group dynamics bring out the best in each member • Internalized value nurtured over time • Supports and structures are in place
Energy, Emergence and Collective Action	• Shared sense of purpose • Non-linear learning/feedback loop • Moving from scarcity to abundance thinking	• Transformation of I to We • Emergent order and convergence • Confluence of ideas and "ahas" • Reach new places within one's own capacity	• Self-driven, organic • We released in all its fullness • Spirit of abundance permeates • Generative energy unleashed and sustained
Networks and Systems	• Groups highly aware of the systems nature of their work • Openness to new input, new partnering and new ventures	• Capacity to reach across and span boundaries	• Power of the collective depends on the quality of the relationships • Changes in notions of accountability • Can constantly reframe hierarchy working within a network-centric approach
Time, Connections, and History	• Shared purpose • Diversity • Access	• Shared values • Inclusion of affected persons • Information equity	• Agreement on process for moving forward • Affected personnel share equally in policy decisions

Person 5—Practices that help foster collective leadership

The Seven Norms of Collaboration

Behavior	Possible ways of encouraging this
Putting Inquiry at the Center—Exploring perceptions, assumptions, beliefs, and interpretations promotes the development of understanding. Inquiring into the ideas of others before advocating for one's own ideas is important to productive dialogue and discussion.	
Pausing—Pausing before responding or asking a question allows time for thinking and enhances dialogue, discussion, and decision-making.	
Paraphrasing—Using a paraphrase starter that is comfortable for you (such as "So..." or "As you are..." or "You're thinking...") and following the starter with an efficient paraphrase assists members of the group in hearing and understanding one another as they converse and make decisions.	
Probing—Using gentle open-ended probes or inquiries (such as "Please say more about..." or "I'm interested in..." or "I'd like to hear more about..." or "Then you are saying...") increases the clarity and precision of the group's thinking.	
Placing Ideas on the Table—Ideas are the heart of meaningful dialogue and discussion. Label the intention of your comments. For example: "Here is one idea..." or "One thought I have is..." or "Here is a possible approach..." or "Another consideration might be...".	
Paying Attention to Self and Others—Meaningful dialogue and discussion are facilitated when each group member is conscious of self and of others, and is aware of what (s)he is saying and how it is said as well as how others are responding. This includes paying attention to learning styles when planning, facilitating, and participating in group meetings and conversations.	
Presuming Positive Intentions—Assuming that others' intentions are positive promotes and facilitates meaningful dialogue and discussion, and prevents unintentional put-downs. Using positive intentions in speech is one manifestation of this norm.	

(Center for Adaptive Schools).

Sources

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Toolbox
Collective Leadership Self-Assessment

1. **Humanity (Mindfulness, Balance, Empathy)**
   Practice: Choose the path with a heart.

2. **Future Possibilities (Future orientation, Empowerment, Decisiveness)**
   Practice: Lead with passion

3. **Engagement (Process quality, Connectivity, Collective action)**
   Practice: Foster collective action

4. **Collective Intelligence (Dialogic quality, Diversity, Iterative learning)**
   Practice: Encourage diverse perspectives

5. **Innovation (Excellence, Adaptability, Creativity)**
   Practice: Nourish creativity

6. **Wholeness (Contextuality, Vitality, Contribution)**
   Practice: Nurture life-enhancing patterns

http://www.stakeholderdialogues.net/learning/toolbox/collective-leadership-self-assessment/

1. **Humanity (Mindfulness, Balance, Empathy)**
   - I have a regular practice (eg. meditation, jogging, walks…) which helps me restore my energy and allows me to reflect:
   - I regularly review my leadership journey:
   - I can act in a situation and at the same time observe the situation and myself in it:
   - I am able to observe patterns of interaction and energy levels within a group or organization:
   - I regularly reflect on what is really important to me:
   - I keep track of my energy levels in what I am doing:
   - I focus my work on what gives me energy or change my way of doing things so that it gives me energy:
   - In the way I lead I am attentive to a balance of passion, commitment and reflection:
   - I am able to see the story behind difficult to understand behaviour:
   - I keep track of my own journey of growth and development:
   - I value relationships at work as a way of invigorating a network of diverse people:
   - I make an effort to understand where somebody with a different opinion is coming from:

2. **Future Possibilities (Future orientation, Empowerment, Decisiveness)**
   - I have my own 5-15 year vision formulated and regularly review it:
   - I align my vision and what I intend to contribute with that of my organization, my project, my initiative:
   - In the way I lead I engage people around a vision and future possibilities:

- In difficult situations I focus on possibilities, potential and solutions:
- I strive to connect my personal goals with a larger vision or a "common purpose":
- I am aware of my strengths and limitations, and build my learning path on them:
- I consciously enhance other people's strength, creative spirit and self-reliance in the way I lead:
- I ensure that my professional conversations are inspiring conversations that tap into possibilities:
- I know what I want to achieve/change and I follow through on it:
- I make decisions based on my values while considering the situation and other people:
- I set priorities and focus on what is important according to my values and measure improvements over time:
- In the way I lead I set clear targets and hold myself and others accountable:

3. Engagement (Process quality, Connectivity, Collective action)

- I engage others the same way I expect to be engaged – I lead by example:
- In the way I lead I access people's hearts, values and aspirations to make a difference:
- I foster engagement and authentic participation :
- In the change I lead I design structured processes with a balance between result-orientation - facts and figures, operational planning - and relationship building - meaningful conversations, emotional engagement, trust building, good communication.
- I am conscious of the way I connect with other people and the world:
- I attend to the quality of relationships because I see them as cornerstones for successful outcomes:
- I build networks and connect people as a way of enacting change and scaling impact:
- When I want to bring about change, I build small groups of passionate individuals (containers) behind a common goal (Quote from Margaret Mead):
- I see success as collectively achieved and give credit to all involved:
- I am good at putting accountability structures in place that ensure results:
- I drive both long-term strategies and easily achievable visible successes:
- I manage cooperation by attending to high-quality engagement and transparent communication:

4. Collective Intelligence (Dialogic quality, Diversity, Iterative learning)

- I am aware of how my thoughts implicate on my actions:
- I listen attentively before I draw conclusions:
- I invite contributions and make my decisions/conclusions transparent:
- When I am in a meeting I attend to the quality of dialogue and assess how I can contribute to making the group collectively intelligent:
- I am continuously developing my capability to withhold my judgment of others:
- I inquire into opposing views, and try to find the good intention behind these views:
- I encourage diversity of perspectives in meetings/workshops/conversations:
- In the way I lead I create regular efficient „thinking together" environments and encourage others to do the same:

- I regularly review my leadership progress and inquire into learning opportunities:
- I evaluate crises as an opportunity to learn and improve:
- I deliberately create settings that ensure collective reviews and strategy adjustments:
- In the way I lead I encourage risk taking combined with structured reflection:

5. **Innovation (Excellence, Adaptability, Creativity)**
    - I strive for excellence/impact in my work/my field of expertise:
    - I keep pace with new developments in my field and stay up-to-date:
    - I honor other people's expertise and know when to bring them in:
    - In the way I lead I encourage striving for excellence and complementing expertise:
    - I stay open to discovering new approaches and expose myself to new ways of doing things:
    - I am aware of my comfort zone and look for opportunities to expand it:
    - I know my limitations and complement them by bringing in other people's strength:
    - In the way I lead I encourage people to expose themselves to new learning and continuous growth:
    - I attend to my creative potential and the creative potential of my team:
    - I allow myself unplanned/empty spaces to foster my creativity:
    - I use creativity tools in day-to-day activities:
    - In the way I lead I foster people´s creativity:

6. **Wholeness (Contextuality, Vitality, Contribution)**
    - I regularly take a bird's-eye perspective and look at how my actions impact on a system:
    - I take a wider picture into account when I deal with an issue:
    - I inquire into the context of a situation or behavior before I initiate change:
    - I encourage people to explore the larger context of an issue in order to see the "big picture":
    - I notice the energy levels in teams/groups/systems and consider how to maintain or raise them:
    - I actively show appreciation for people, nature and life:
    - I nurture a culture of mutual support:
    - I acknowledge support, ideas, contributions, achievements and return as much as I can:
    - I know my unique gifts and how to draw on them:
    - I regularly review my contribution to a larger sustainability goal/strategy:
    - I foster people's strength and unique contribution:
    - I hold myself and others accountable to a set of sustainability goals in line with the motto "people, profit, planet":

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Source: (Center for Adaptive Schools)

Introductions:

Purpose: At some point you want to activate positivity within the group, the earlier this can be done the better. Begin your presentation with an activity that helps people clear their minds and focus on the learning.

Strategy A: Use cards like the Group Works Card Deck or Inspired Mastery's Pause: 52 Ways to Shift Any Outcome in Less Than a Minute Cards. There are many possible card sets on the market. Many bookstores carry a selection. Invite people to take a card, read it, and make a connection between the words on the card and the subject of the meeting/event. People can then introduce themselves and share a connection as a whole group, small group, or in pairs.

Strategy B: Have participants interview each other in pairs using an Appreciative Question. Appreciative Questions help people connect to a positive experience and success. For example, an appreciative question on the topic of presenting might be:

> "Describe an experience when you felt that your presentation really made a difference to the people in the audience. A time when participants left feeling inspired by what they learned. What happened? What about this experience was different?"

For a list of Appreciative Questions you can look at Appreciative team building: Positive questions to bring out the best of your team.

Strategy C—Have people share a quality they are bringing to the presentation. We have heard people say openness, flexibility, courage, joy. The list is endless.

Learning Goals:

Purpose: Have participants learn what is planned, reflect on their own goals for the meeting/event, hear other participant's goals, and see how what the group wants to learn compares with what was planned for the meeting/event.

1. Put your goals on a flip chart and go over with group
2. Have the group write their own learning goal for the meeting/event – ask each person to write on an index card a goal they have for the meeting/event.
3. Have people share at tables what their goal is after they have written it.
4. Hear a goal from each table – flip chart.
5. **Respond to Goals:**
   - If they align with the planned goals say so
   - If there are a couple things that weren't planned but you think we can adjust say so
   - If there is something that we hadn't planned and won't get to – can't adjust – say what it is and why it won't be covered, and who will make sure it will be addressed in the future

Gallery Walk:

Purpose: To provide an alternative to the traditional report-out format.

1. Introduce the Gallery Walk. This is a way for people to receive information by walking around the room, reading posters, and posting their comments and questions.
2. This is something that allows for visual and kinesthetic learning AND allows people to learn information and how others are responding to it.
3. Participants take stickees and a pen with them as they walk around the room and read the posters. They write down comments or questions on stickees and put on posters. Give an example or two, you might write, I wonder about this, or I really like this.
4. Participants will have time to review what others have written.
5. Facilitators will read what people write on stickees to help get an idea of how people are thinking about the material.
6. Facilitators could facilitate small group discussions and sharing with whole group afterwards – depends on time.

Appreciative Interviews:

Purpose: Provides a strengths based format for learning about what exists in any organization and community and begins the process of building upon this to develop a dream for the future. Description of activity:

1. Participants each receive an Appreciative Inquiry question/series of questions
2. People form pairs – (may be a trio if there is an odd number)
3. One person goes first – they answer the question(s). The other person listens.
4. Then – they switch roles
5. Poster activities: group the pairs into small groups of 4. Have them share highlights of what they **HEARD**. Groups synthesize for each question and track themes.

Examples of appreciative questions are listed in the following books: Encyclopedia of Positive Questions, and Appreciative Teambuilding.

World Café:

The World Café is a process used to structure small group discussions about questions that matter. Before you begin describe the process a little:

1. **World Café is based on the following assumptions:**
   - The knowledge and wisdom we need is **already present** and accessible
   - There's a **deeper intelligence.** Our job is to get at it.
   - **Collective insight evolves from:**
     - Honoring unique contributions
     - Connecting Ideas
     - Noticing d**eeper themes and questions**
   - **Intelligence emerges** as the system **connects to itself in diverse and creative ways**
2. The major premise here is that the **questions we ask and the way we ask them will focus** us in a particular manner and will greatly affect the outcome of our inquiry.
3. **If we ask: What is wrong and who is to blame?** We set up a certain dynamic of **problem solving and blame assigning**. While there may be instances where such an approach is desirable, we have found it much more effective to **ask people questions** that **invite the exploration of possibilities** and to **connect people with why they care**.
4. In World Café, we are hoping to get to **"shared meaning"**, which does not mean that we all share the **same perspective** on what is true, but rather, that each participant has the opportunity to **share what is true and meaningful for them**. This in turn will allow us all to see our **collective situation in a different light**, hopefully enlarging our individual views of truth along the way.

Guidelines For Café

As we enter into our World Café conversations, there are a few things that we need to keep in mind:

- Offer your **individual perspectives** and listen for what is **emerging "in the middle of the table**".
- Use the tablecloths and markers to create a **"shared visual space"** through drawing the emerging ideas. Sometimes the co-created pictures can really be worth a thousand words in showing the relationships between ideas.
- **Our conversation will consist of several discussion rounds.** You will change tables between rounds to allow for a web of connections to be woven in a short period of time. Each time you travel to a new table you are bringing with you the **threads of the last round and interweaving** them with those brought by other travelers.
- One person will remain at the table to act as the **table host.** This person will **summarize the conversation** of the previous round and encourage guests to summarize the conversations at their prior tables. **The host is not a facilitator**. They are the custodians of the information generated in

discussions at each table. They help to connect ideas and thread the conversations together.

Underlying principles

- This is not a place to form an **action group or committee**
- **This is not a place to argue your point, force your agenda, it is a place to explore what possibilities we have before us as a group**
- **All voices** will be heard. And are encouraged to be heard
- What's said is **not owned** by anyone

Before we begin—your job here—Café Etiquette (to be put on the wall):

- Focus on what really matters
- Contribute your thinking
- Speak your mind, Share your heart
- Listen to understand
- Link and connect ideas (what connects the web of ideas—synapses in the social brain)
- Listen together for insights, patterns and deeper questions
- Play, doodle, draw, use the tablecloths
- Have Fun
- Check for Agreement from group
- Listen Together and Notice Patterns—**Listening is a gift** we give to one another. The **quality** of our listening is perhaps the most important factor determining the **success of a Café**. When **jazz** musicians get together to jam, the best listener ends up contributing the most to the music, because they are able to **play off of whatever is being offered by the other** cats in the band. Café conversations share that jazz element, of i**nviting each person to express him or herself authentically**, and those who listen skillfully are able to easily **build on what is being shared**.

Open Space Technology:

Open Space Technology allows all types of people, in all sorts of organizations, to create inspired meetings and events. Interested in using Open Space Technology?

Frequent results of Open Space Technology are:

- Improved communication
- A recognition of the value of diverse voices and opinions
- Creative solutions
- Increased collaboration

Although Open Space Technology may appear to be very unstructured, it follows a process. The process works because it allows:

- Self-managed discussion or work groups to form

- Shared leadership
- Diversity
- Opportunities to think creatively

Here's the Open Space Technology process:

1) Ask participants to either sit or stand in a circle; welcome them.
    - Introduce Open Space Technology. It is a process used all over the world with large and small groups. It allows participants to select what they are most interested in discussing at that time.
    - There is a guiding question that is posed to the group as the overarching theme of discussion.
2) Explain the process:
    - Five principals
      Whoever comes are the right people
      Whatever happens is the only thing that could
      Whenever it starts it starts
      Whenever it is over it is over
      Wherever it is, is the right place
    - One law – law of 2 feet – if you aren't learning or contributing take yourself somewhere that you will.
    - Butterflies – don't go to any sessions.
    - Bumblebees – jump from session to session – cross-pollination.
    - Hosts – call a session by stating a question or topic and agreeing to report out – not a facilitator.
    - If no one comes to your session you can either: stay put and think about the topic, wait and see if others join later, or cancel the session and join another group.
    - Reporting out – have forms to fill out to capture discussion, and if time have groups present to the large group highlights from their session.
    - Finally, be prepared to be surprised.
3) Starting – Opening the Space:
    - Invite anyone who wants to pose a topic or question for discussion in a small group to write the topic/question on a sheet of paper in the middle of the room and announce it to the group with their name. After this they will post it on a wall.
    - Proposing an idea does not mean that you will make a formal presentation on it or even agree to facilitate; it means that you take responsibility for hosting a group discussion, are committed to being in that group and write up key points.
    - If no idea comes to you, that's fine.
4) The market place:
    - Have the hosts (and the group):

    - Discuss whether they want to combine any sessions or cancel any sessions. If doing more than one round of discussion, hosts can change their proposed time slot if they want to.
    - Decide where the groups will meet—have the hosts choose or assign the groups a table or place to meet. Post the information on the board for all participants to see.

5) Open the sessions:
   - People leave their seats, go to the wall where the meeting times and places are posted and sign up for sessions.
   - Sessions begin.
   - For each conversation/session there is a report-out form.
   - Give a few minutes "warning" before the close of each to sum up conversation for report out forms.
6) Report out:
   - If there is time - each group has the opportunity to present something significant that came out of the discussions, such as an "aha" moment, next steps, etc.
7) Closing Circle:
   Reconvene in a circle. Allow each person the opportunity to share something from his or her experience or learning. Pass an object, whoever has it has the opportunity to speak. If you don't want to speak, pass the object.
8) Book of proceedings
   Every participant gets mailed/emailed a copy of all the report out forms for all the discussions.
9) Assumptions of Open Space Technology:
   - All knowledge and wisdom that we need are present and accessible here today.
   - Intelligence emerges as we connect our wisdom and experience. This means that within the process we work to:
     - Honor the unique contributions of others.
     - Listen to understand and connect ideas.
     - Listen together for patterns and knowledge emerging.

Liberating Structures: http://www.liberatingstructures.com/
This website offers thirty-three guides to facilitation techniques that can be used in community engagement processes.

Resources:

Open Space Technology Resources

- *Open Space Technology A User's Manual* by Harrison Owen
- *The World Cafe: Shaping Our Futures Through Conversations That Matter* by Juanita Brown, David Isaacs, World Cafe Community, and Peter Senge

Appreciative Inquiry (AI) Resources

- *Positive Family Dynamics: Appreciative Inquiry Questions to Bring Out the Best in Families* by Dawn Cooperrider Dole, Jen Hetzel Silbert and Ada Jo Mann
- *The Joy of Appreciative Living* by Jacqueline Kelm
- *Appreciative Coaching* by Sara Orem, Jacqueline Binkert, Ann Clancy
- *The Coach's Guide to Asset-Based Thinking and Appreciative Coaching* by Kathy Cramer, PhD, Peggy Guest, PhD, Sara Orem, PhD, and Hank Wasiak
- *The Thin Book of SOAR: Building Strengths-Based Strategy* by Jacqueline M. Stavros, Gina Hinrichs, and Sue Annis Hammond (SOAR stands for Strengths Opportunities Aspirations and Results)

Appreciative Inquiry Books with Appreciative Questions

- *Appreciative Teambuilding* by Diana Whitney & Amanda Trosten-Bloom, Jay Cherney and Ron Fry
- *The Encyclopedia of Positive Questions* Diana Whitney, David Cooperrider, Amanda Trosten-Bloom, and Brian Kaplin.

Websites

Appreciative Inquiry Commons - *http://appreciativeinquiry.case.edu/*
Open Space Technology - *www.openspaceworld.org*
World Café - *www.theworldcafe.com*

Liberating Structures: http://www.liberatingstructures.com/
This website offers thirty-three guides to facilitation techniques that can be used in community engagement processes.

Cards

Group Works Card Deck: http://groupworksdeck.org/deck
Inspired Mastery's Pause: 52 Ways to Shift Any Outcome in Less Than a Minute Cards: http://inspiredmastery.com/?page_id=13

Plan – Do – Reflect Cycle: Trying Something New

Step 1: Plan **Step 2: Do** **Step 3: Reflect**	

Step 1: Plan – Before trying something new, it is helpful to have a plan to support yourself

1. What is the new thing you want to try?

2. How, when, and where will you be able to try it? Name the specific event:

3. What do you need to have prepared in advance?

4. What would be some success indicators? How will you know that the new thing worked?

5. What support might you need in order to try this out?

6. What do you want to pay attention to in yourself?

Step 2: Do –– Try the new thing

Step 3: Reflect – After you tried the new thing reflect on how it went

1. What happened? How do you think it went?
2. How did it compare with your expectations? What went as expected, what didn't? What effect did your decisions have on the result?
3. What did you learn when you tried this new thing?
4. What would support you in trying again or trying a different new idea or strategy?
5. What will you try next? (Return to step 1)

Resources on Collective Leadership

Leadership & Large-Scale Change: How to Accelerate Learning and Deepen Impact, June 2015 by Leadership Learning Community
http://leadershiplearning.org/leadership-resources/resources-and-publications/leadership-large-scale-change-how-accelerate-learnin

Stanford Social Innovation Review (SSIR) The Dawn of System Leadership
http://www.ssireview.org/articles/entry/the_dawn_of_system_leadership

Collective Leadership Assessment
http://www.stakeholderdialogues.net/learning/toolbox/collective-leadership-self-assessment/

Strengthsfinder 2.0 by Tom Rath and *Strengths-Based Leadership* by Tom Rath and Barry Conchie

Emotional Intelligence 2.0 by Travis Bradberry and Jean Greaves

Many assessments in the book *Developing a Learning Culture in Nonprofit Organizations* by Stephen J. Gill

Facilitator's Guide to Participatory Decision Making by Sam Kaner

Decisive – by Chip and Dan Heath

Reinventing Organizations: A Guide to Creating Organizations Inspired by the Next Stage of Human Consciousness by Frederic Laloux

Life Cycle Assessment: *Five Life Stages of Nonprofit Organizations* by Judith Sharken Simon

Liberating Structures: http://www.liberatingstructures.com/

Assessment of Individual Conflict Styles -- Style Matters http://www.riverhouseepress.com/

Wilder Collaboration Assessment - http://wilderresearch.org/tools/cfi/index.php

Organizational Assessment of Conflict - http://www.conflictclimate.com/

Is There an Emotional Vampire on Your Team? Free audio available at http://bethebestbossever.com/id-vampires/

Archived Webinars by Cassandra O'Neill for the Society for Nonprofits
The first link below is on Collective Leadership and the second one is on Collective Impact.

https://www.snpo.org/coursearchive/coneill/collectiveleadership.php
https://www.snpo.org/coursearchive/coneill/collectiveimpact.php

Decision Making Handout

The decision making matrix allows for an organization or team to list the key decisions that are being made and clarify who is Responsible for making the decision, who has authority to Approve or Veto who should be Consulted, and Informed, and who will Support the implementation of the decision.

* **Responsible:** The person(s) who is/are responsible for making the decision.
* **Approve or Veto:** The person(s) who has the right to approve or veto
* **Consult:** Person(s) who should be consulted when gathering information and making the decision.
* **Informed:** Person(s) who needs to know what the decision is.
* **Supports:** Person(s) who support the implementation related to the decision.

This tool is a useful and effective decision making tool that helps to define roles and responsibilities, eliminate role confusions, identify inefficiencies of organizational roles, and help resolve any functional issues that arise within departments or between individuals.

Following are **benefits** using this tool in your organization:

- Identifying the workloads that have been assigned to specific employees or departments
- Making sure that processes are not overlooked
- Ensuring that new recruits are explained their roles and responsibilities
- Finding the right balance in responsibilities
- Redistributing work between groups to get the work done faster
- Open to resolving conflicts and discussions
- Documenting the roles and responsibilities of the people within the organization

Decision Making MATRIX (sample organization)						
R=Responsible (for making the decision); A or V = *(right to veto); C=Consult (those whose advice/opinions are needed to make decision); I=Inform (those whom are kept updated); S= Supports (those implementing decision)*						
Decision	**Board**	**Executive Director/CEO**	**COO**	**Department Director**	**Caseworker**	**Volunteer Tutors**
Area of responsibility: Communication						
How to do annual strategic planning	**R**	**R**	**C**	**C**	**I**	**I**
What grants to apply for	**I**	**R**	**R**	**R**	**S**	**S**
What fundraising to do	**I**	**R**	**C**	**C**	**I**	**I**
What eligibility requirements are for participants	**I**	**R**	**C**	**C**	**C/S**	**C/S**
How to best provide support services	**I**	**R**	**C/S**	**C/S**	**C/S**	**C/S**

A decision making matrix helps resolve organizational confusion by addressing misconceptions employees have regarding:

- Role perception: The attitude or thinking of people towards their work roles
- Role expectation: The expectation of a person with regards to another person's job role and involvement in decision making.
- Role behavior: The activities of people in their job function.

Although **role confusion** regarding critical decision making can be helped by using this decision making matrix, it is always a good idea to identify the reasons behind such confusion. This helps the organization to avoid such situations occurring in the future.

Following are some of the reasons for role confusion regarding decision making:

- Confused as to who makes the decisions
- Resentment or bad feelings from lack of clarity around decisions made in the past
- Ineffective communications when decisions have been made and are being presented in a way that appears as if staff are asking for input, or staff asking for input but not being open to changing anything
- Lack of clarity in orientation of new employees
- Rapidly changing circumstances in and outside the organization

A decision making matrix can be successfully used under the following conditions:

- For employees to get a clear understanding of the role and responsibilities around a decision making process.
- To improve the understanding of function between departments and responsibilities within one's department, across departments, and between the staff and Board.
- To clearly define the roles and responsibilities of team members, who are working on a project.

Questions to Ask When Consulting and/or Informing

Communicating when making decisions is vital for leaders, and communication is one of the most frequently raised issues within organizations. A leader's effectiveness in consulting stakeholders and/or informing them can be improved by thinking ahead and being able to answer the following questions:

- ☐ ***What is our intent in reaching out?*** Managers and leaders need to know the phase of decision making in which they are seeking input or informing. If a decision has already been made, then seeking input to the decision is moot (and will cause frustration among stakeholders). If the discussion is just beginning and you are not attached to an idea, that is a very different discussion than if you have mostly made up your mind and are just consulting with others to see if you've overlooked something or can be convinced otherwise.

- ☐ ***How is the decision connected to organizational vision, mission, goals and values?*** Hopefully this is a question you ask yourself on a regular basis to help guide you in making decisions. It is equally important to share that information with people who may not feel connected on a daily basis to the vision, mission, goals and values. For people who are focused on the day-to-day, getting help in connecting things to the bigger picture is necessary and exciting. The decisions you make, how you make them, and how you communicate them also affect your organizational culture and should reflect the values you have articulated towards the kind of culture you strive for.

- ☐ ***What are the key points/messages you want to communicate? And to whom?*** Know what you really want to communicate about the decision and to whom you need/want to communicate. Document them and get everyone who might be communicating the message on the same page.

- ☐ ***Why is this decision being made?*** Stakeholders need to know why a decision is being made or has been made. Hearing the reason(s) behind it builds trust, helps people open up and hear, creates context for better understanding, and increases buy-in.

- ☐ ***Who is making the decision?*** You can use a RACI(D) matrix to help you determine who should be making what kind of decisions (see previous pages). This also helps others understand what their relationship is to a decision.

- ☐ ***Who, when, and how will the decision be communicated?*** Is one person going to announce the decision? Will it be announced to everyone at the same time? When does it need to be done? What medium should it be communicated through (this may be different depending on the audience and weight of the decision)?

- ☐ ***How can we ensure that people understand the decision?*** Communication is a two-way street. Thus, your stakeholders need to know how they can find out more, participate in the decision making process (if appropriate), ask questions, etc. They also need to know who they can communicate with if they need help understanding or want to engage.

Decision	ACTOR (individual/group)									

CODE: R = Responsible (make decision) A-V = Approve (right to veto)
C = Consult (advise) S = Support (put resources against) I Inform (to be informed)

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Prioritization Tool

How do you make a decision when you have more opportunities to partner than you can say yes to?

When you have more partnership opportunities or ideas than you can say yes to:

- Think about the types of requests you are getting, who they are from, and what is being asked of the library.
- Tracking this over time can be helpful for planning.
- Thinking about the kinds of requests you are getting – which ones are the best match with the library's mission, vision, goals, and resources?
- Who is getting the requests?
- Who is making the decisions related to how staff time is spent related to partnership development?
- Who do you want to involve in these kinds of decisions?
- There is a decision making matrix that can help you think about this – See Attachments 12 and 13 in the Community Engagement Toolkit .

This is another tool - a prioritization tool to "score" the partnerships or ideas which can help you make decisions.

In the sample Matrix, the criteria of Lasting Impact is used, and includes questions that are related to significance and lasting impact. There are other criteria that could be used such as existing ability.

The tool can be used by individuals and groups. One way to use it is for a group to rank their activities/outcomes individually, and then discuss it, and agree on a ranking for the group.

If there are other criteria that are important, questions can be developed or added to the sample questions. Below is a set of questions that can be put in the prioritization tool to assess the existing ability of the partnership/organization to meet the shared goals. The higher the score, the more "ability" to meet the goals.

Questions that can be used in the Matrix to determine Ability of the partnership/organization

- How many people need to be involved to make this happen? A scale of 1 (many) to 3 (few)
- Whose approval is needed? A scale of 1 (someone not currently involved in the discussions) to 3 (people who are currently involved in the discussions)
- How long will it take? A scale of 1 (long time) to 3 (can be done quickly)
- How easy will it be? A scale of 1 (hard) to 3 (easy)

Priority Matrix - Criteria used for Prioritization: ____Lasting Impact

Goals/ Ideas	Will the idea/activity require additional funding/resources? 1 require additional funding -3 can do with existing funding/resources	Will the idea/activity be easy or difficult to continue? 1 difficult -3 easy	How long will the benefits of the activity continue? 1- short time – 3 long time	How easy will it be to get funding if necessary? 1 hard – 3 easy or don't need more $	How long will it take to get funding to continue activity? 1 long time – 3 short time or don't need more $	How significant will the impact be of this activity?1 not very – 3 very significant	total

Media Resources for Libraries

Resources written for Nonprofits but GREAT for Libraries too

- Measuring the Networked Nonprofit by Beth Kanter and Katie Paine
- Beth's Blog http://www.bethkanter.org/
- A Strategic Guide to Social Media for Nonprofits www.sproutsocial.com

Resources mentioned in the Reaching Stakeholders webinar:

- Facebook Group Libraries and Social Media https://www.facebook.com/groups/LibrarySocial/
- Start With Why video: https://www.youtube.com/watch?v=sioZd3AxmnE
- Start With Why Book: https://books.google.com/books/about/Start_with_Why.html?id=iyw6ul1x_n8C&printsec=frontcover&source=kp_read_button&hl=en#v=onepage&q&f=false
- John Palfrey's book BiblioTech: Why Libraries Matter More Than Ever in the Age of Google: http://www.amazon.com/BiblioTech-Libraries-Matter-More-Google/dp/0465042996
- The source of the age demographic diagram: http://socialmediaweek.org/blog/2015/04/9-major-social-networks-age/

Recent market share statistics: which communities are gaining popularity?

- Pinterest, Instagram Growing Faster Than Twitter, Facebook: Media Bistro's title is odd because the real news is that Tumblr grew the fastest of all.
- Tumblr Overtakes Instagram As Fastest-Growing Social Platform, Snapchat Is The Fastest-Growing App: TechCrunch analyzes the same Global Web Index statistics for the 3rd quarter of 2014

Analysis of Facebook alternatives

- It's Time to Ditch Facebook and Start Over: Gizmodo posted this easily digestible list of alternatives organized by type of use.
- New Data: Why Your Fans Aren't Following You on Social Media: Hubspot provides data here that may help you pick your next new platform.
- A Teenager's View on Social Media, Written by an actual teen: Bad news if you're trying to reach teens via social media.
- Social Media Comparison Infographic: from Leverage New Age Media, they say they will try to update this every 6 months.

Quick Resources

- 10 Social Media Marketing Tips for Libraries by Ellyssa Kroski http://oedb.org/ilibrarian/10-social-media-marketing-tips-for-libraries/
- How Libraries Are Using Social Media: Expanding Online Toolkits to Promote Advocacy by Terra Dankowski (http://americanlibrariesmagazine.org/authors/terra-dankowski/)

- The Librarian's Nitty Gritty Guide to Social Media by Laura Solomon
- Bite-Sized Marketing: Realistic Solutions for Overworked Librarians by Nancy Dowd

Best practices

- The Recipe for Perfect Social Media Posts [Infographic]: This one from Hubspot has a very well done infographic explaining the different audiences and strategies.
- 6 Reasons Social Media Isn't Working for Your Small Business: Rebeccah Radice distills the reasons social media accounts fail to build a following into 6 points.
- 26 Creative Ways to Publish Social Media Updates: *Social Media Examiner* has some really, really good advice applicable to most platforms. Good stuff.

Press Releases

- Press Releases: The Press and Media by the Ohio Library Council http://www.olc.org/marketing/4press.htm
- 10 Essential Tips for Writing Press Releases by the NJ State Library http://www.ala.org/alcts/confevents/preswk/events/10tips
- National Library Week 2014 – Sample Press Release http://www.ala.org/conferencesevents/national-library-week-sample-press-release
- Sample of a Good News Release by the Montana State Library http://msl.mt.gov/WhatsYourStory/How-Tos/tl_gn_goodrelease.asp

Six Elements of Collective Leadership

Collective Leadership:
What is It, Why is It Important, and How Can You Build Capacity for It?

Collective Leadership – a group of people working towards shared goals while sharing decision making and working collaboratively. So that the entire team strives for the same goal with enthusiasm, and energy.

Learning Objectives

- Understand the Fundamentals of Collective Leadership and the 6 Elements of Collective Leadership
- Be familiar with the differences between Classical and Collective Leadership
- Learn about resources for self-assessment and capacity building of Collective Leadership

Classical and collective leadership compared	
Classical leadership	**Collective leadership**
Displayed by a person's position in a group or hierarchy.	Identified by the quality of people's interactions rather than their position.
Leadership evaluated by whether the leader solves problems.	Leadership evaluated by how people are working together.
Leaders provide solutions and answers.	All work to enhance the process and to make it more fulfilling.
Distinct differences between leaders and followers: character, skill, etc.	People are interdependent. All are active participants in the process of leadership.
Communication is often formal.	Communication is crucial with a stress on conversation.
Can often rely on secrecy, deception and payoffs.	Values democratic processes, honesty and shared ethics. Seeks a common good.

Drawing from material in Gloria Nemerowicz and Eugene Rosi (1997) *Education for Leadership and Social Responsibility*, London: Falmer Press. Page 16.

Introduction—What is Collective Leadership:

In your role, have you ever felt like you were standing before a mountain you had to climb? As it loomed above you, you may have felt like there was no way you could ever get to the top. Perhaps you felt alone, with no one and nothing to help you.

Now imagine that instead of focusing on the mountain, you had turned around to find that behind you were people waiting to help. Each with unique tools, skills, and knowledge, everything you might need to make it to the top, if you all worked together.

This metaphor for non-profit professionals—invites exploration of those around you. It presents a question: what if the solutions to your dilemmas and to those situations where you feel stuck are living inside the staff, co-workers, and participants in your program? What if, by changing your position—or turning around—you will find you have everything you need?

That's what collective leadership is. It is a chance to feel surrounded by support and resources. So instead of having a leadership mindset that leaves you figuring out everything alone, you are one of a team. The following graphic displays the six elements of collective leadership.

What does this look like? 6 key practices

1. Identifying Shared Goals: The first step in Collective Leadership is to establish common ground, to figure out where you share values, goals, and motivation. This could be with your team, or together with families. Often people think they don't agree with others in their workplace or that there isn't alignment, because they don't have the kinds of conversations that will uncover shared goals. So, look a little deeper. Search for goals that everyone can agree on. We have found that it's helpful to start with the broadest possible language and then work your way to more specific goals. It's also helpful to presume positive intentions, to make the good-faith assumption that everyone has been inspired to enter the early childhood field, and that they want to improve the educational outcomes for young children.

So how can you identify a place of agreement? The simplest way to begin is to ask questions that help people talk about what their goals are for children, families, and their program. For example, "What inspired you to work with children and families?" or "What are your hopes for the children affected by your work?" We use these questions when facilitating staff meetings, retreats, or professional development. Participants are often surprised, and sometimes shocked, to hear that their co-workers love working with children.

Once you have identified an overarching goal that everyone can agree on, such as "we want children to be successful and for staff to be healthy and happy", then you can narrow down to what this might look like or what it might take to get there. Feeling advanced? A key question to consider: How can the day-to-day work experience be changed to reveal these shared goals and values?

2. Structures and Processes for Shared Decision Making: A first step for exploring shared decision making is to look at the kinds of decisions that are currently being made by leaders in your program, and how are they being made. If important decisions are being made by one or two people and then told to staff, there is an opportunity to identify some decisions that might benefit from more staff involvement. There are multiple tools to help identify the decisions being made, the individuals or groups that could be involved, and possible ways of involving them. One tool is called the RACI, which stands for Responsible, Accountable, Consult and Inform. This can be used to help identify who will be responsible for making a decision, who can veto or approve a decision, who can be consulted for input and information, and who needs to be informed once the decision is made.

Caution! Although people love the opportunity to share their opinions and experiences, they don't like to be asked their opinion only to have it ignored. Prevent this danger! Be clear about what you are seeking input on. Are you seeking input on a decision that hasn't been made yet? If so, you can invite people to share their opinions and have input on the decision. Then follow-up when the decision is made—share with people what the decision is, explain why it was made. If there were things that people suggested which you didn't do, it goes a long way to help them feel heard and valued if you explain why.

If a decision has already been made (by you or someone else) and you can't change it, ask for input from people about how to work with the decision. Again, be clear. There is nothing more frustrating than discussing what you want a decision to be, when the decision has already been made.

3. Identify and Build on Strengths: Explore what people are good at. What are their talents, and interests? What do they like doing or know a lot about? Seems obvious, right? But research suggests that 70% of people Do NOT get to use their strengths at work. Don't let this happen to you or your team. How do you find out more about your strengths? There are several great ways to find out. One is the Strengthsfinders Assessment by Gallup. You can buy the book Strengthfinders 2.0 (Rath, 2007) or Strengths Based Leadership: Great Leaders, Teams, and Why People Follow (Rath, 2009). Both books will come with a code that you can use to complete the on-line assessment. The Strengths-Based Leadership report generated from the assessment also includes information on how to work with others who report to you.

Another strengths assessment is the VIA Inventory of Strengths, formerly known as the "Values in Action Inventory." This is a psychological assessment measure designed to identify an individual's profile of character strengths (http://www.viacharacter.org/www/).

One final way is to use Appreciative Questions. These focus on "peak experiences" that people have had, and can be related to any topic. For example, "What was a peak experience you had as an educator, team member, with this school, or learning something that made a difference?" If you're interested in exploring how Appreciative Questions could help, there are two great books with interview guides on many topics: Appreciative Team Building: Positive Questions to Bring Out the Best of Your Team (Whitney, Trosten-Bloom and Cherney, 2004) and the Encyclopedia of Positive Questions, 2nd Ed. (Whitney, Trosten-Bloom and Cooperrider, 2014).

After you have found out more about people's strengths, explore how they could use more of their strengths at work, and how they could apply their strengths to reach shared goals.

4. Rotating and Sharing Roles so Team Members Can Activate Their Gifts: What a concept! You mean the "boss" doesn't have to facilitate every meeting and training? That's right! Rotating responsibilities for things that your team (or organization) needs, helps everyone grow their skills and creates a learning community. Looking for new ideas of how to run great meetings or trainings? We have an e-book, The Six Secrets to High Impact Presenting. Additionally, a great website with innovative meeting ideas is Liberating Structures: Including and Unleashing Everyone, http://www.liberatingstructures.com/.

5. The Whole is Greater Than the Sum of the Parts: To realize this requires activation of the collective intelligence of the staff. How do you do that? By using high engagement methods to facilitate meetings and trainings rather than using stale one-way communication strategies.

Sometimes assumptions are made that there is nothing going on in the minds of those who are quiet. This couldn't be farther than the truth, yet we may not have the tools to access it. So, how do you get at this hidden knowledge? We've already explored asking different kinds of questions. In addition, we can also look at different processes that engage the intellect in more active ways.

Creating a space where people feel that their thoughts and ideas are welcome is the first step. The second step is inviting the collective wisdom to surface by inviting people to interact and have conversations about issues where you are looking for solutions. It's hard to come up with solutions cold. But by letting people be in relationship with each other you will get outcomes that are entirely different from those that come from one-way communication.

6. <u>Best Practices for Organizational Effectiveness</u>: Is your organization following them? There are many best practices for organizational effectiveness. One of these is creating structures and processes for recognition. This isn't one-size that fits all. People like to be appreciated in different ways. Taking the time and making a norm of your culture to appreciate others can drastically alter the moral, motivation, and performance of your whole staff. Take the plunge!

> *"Go to the people. Live with them. Learn from them. Love them. Start with what they know. Build with what they have. But with the best leaders, when the work is done, the task accomplished, the people will say, 'We have done this ourselves'" -Lao Tzu*