

Innovation-as-a-Game

There is a large overlap of properties between the innovation process and having fun. Innovation-as-a-Game uses the methodologies of game writing and game playing to create an environment where ideas and collaborations can naturally emerge.

Although it is impossible to define fun, there are some general properties that indicate people are having fun¹:

- **Engagement** with others
- **Learning** something unexpected
- Satisfying **curiosity**
- **Exploring** with someone else
- Sharing moments of **discovery**
- Permission to be **creative**

Each of these properties drive towards an “Aha!” moment. This moment is very personal and very spontaneous. The ownership of that moment creates a fond memory. Experiencing the moment with others creates a “You had to be there” story. Sharing the moment of discovery with someone else creates a new collaboration link.

The Innovation-as-a-Game methodology borrows much from the sophisticated frameworks of writing and playing a live-action role playing (LARP) game at MIT. In a LARP, a group of people are given a set of tasks and they are accomplished through ingenuity and creativity. Using these rules, the games themselves vary drastically: from as short as 4 hours to as long as 10 days. Ideally, no two runs of the same game should be the same. Different players will optimize for different outcomes based on the individual and the group dynamic. The pathways in which the players execute their tasks can be surprising, comedic, tragic, creative, unexpected – in short, *innovative*.

A good game needs to be balanced among all of the factors. Too much to accomplish and players get frustrated that they can’t get anything done. Not enough to do and players get bored. Too ridged in structure and players will feel that they can’t be creative. Too loose and unorganized and players can feel lost and that the game is a waste of time. Too much randomness and the game will feel confusing. Too normal and players won’t feel challenged or excited to play. Out-of-the-box ideas cannot be scripted nor planned.

Innovation-as-a-game is a balanced set of properties that creates an Ideosphere. It is a space with the right ingredients in the right proportions where ideas and emergent behaviors can spawn from the churn and mixing of thought. It emphasizes memetic diversity by intentional inclusion of different backgrounds, diverse demographics, and dissimilar experiences. A game is therefore a purposeful, safe environment for self-identified curiosity-driven individuals to interact with others outside of their professional and personal context.

¹ *The Future of Fun: Life in a Virtual and Augmented World*. MIT Enterprise Forum Northwest. May 19, 2016
Retrieved: <https://www.mitefnorthwest.org/event/future-fun>



The main components of Innovation-as-a-Game are:

- **Setting and theme** – The introduction of the game, motivations, and global background.
- **Rules** – What the Innovation Game is and is not allowed to do.
- **Character sheets** – The descriptions of individual participants. What is everyone trying to accomplish in the game?
- **Blue sheets** – Descriptions of the groups and categories the individuals represent.
- **Green sheets** – The mechanism of how things work inside the game, including activities and interactions.
- **Locations** – Places within the game that can encourage different ways of mixing.
- **Items** – Physical things that players interact with.
- **Name badges** – Identify information so you know who you're conversing with.

Game Components at-a-Glance

Setting and Theme	<ul style="list-style-type: none"> • Values of Authenticity, Innovation and Paying-it-Forward • Mixing of multiple communities • Building of new communities • Enabling emergent behaviors that result in ground-breaking innovation • Setting next to water or mountains
Rules	<ul style="list-style-type: none"> • Retreat schedule and program with speaker bios • Implied that students will be expected to act like adults, given the number of professionals around. Previous retreats have disintegrated into parties due to too few professionals in the room. • Implied that professionals will be teaching students. Kept the conference relaxed and social instead of high-powered professional. • Registration instructions and process • End-of-conference survey
Character Sheets – the attendees	<ul style="list-style-type: none"> • Everyone came with their own “question” to answer. This could be made more explicit at the beginning of the game. • Everyone brings a question to answer AND something to teach?
Blue Sheets – the Groups	<ul style="list-style-type: none"> • Hosts – Invite the speakers, be the hosts. • Organizers – keeper of the logistics for the weekend. • Facilitators – kept the discussions moving. • Speakers – injected creative ideas. • Volunteers – a student to help with logistics. • Scribes – To take notes on the Circles, Talks, and Breakout sessions and to draft the final proceedings. • Tribal Elders – Community elders that perform mentorship in small groups. • Attendees – Intentionally diverse <ul style="list-style-type: none"> ○ Age groups – Undergraduates, mid-career, executives, retirees. ○ Sector groups – Bio, infrastructure, software, government, etc. ○ Ethnic groups – Middle east, Hispanic, Asian, Caucasian, African, etc. ○ Others as needed or identified.
Green Sheets – the Processes	<ul style="list-style-type: none"> • Circle – for building a community of curiosity, avoiding a culture of complaint. • Talks – for new information. • Breakout Sessions – centered around puzzles and problems with solutions. • Registration Desk – centralized clearinghouse of information. • Restaurants – for convening small groups. • Carpools – How to share rides to spread people out • Housing – How to decide on where to sleep and further networking • Evening Activities – Options for after dinner • Proceeding Writing – To document the outcome of the retreat

Signs – the Locations where things happen	<ul style="list-style-type: none"> • Main conference room • Breakout rooms • Restaurants / Pubs • Inns / AirBnB • Cars • Registration Desk • Outdoor sites
Items	<ul style="list-style-type: none"> • Coffee / food • Tables / chairs • AV / video • Breakfast foods for the houses • Paper / easels / markers • Gifts to facilitators / speakers
Name Badges - Identity	<ul style="list-style-type: none"> • Name • Location • What question do you bring with you?

Setting and Theme

The introduction of the game, context, motivations, background, etc. Why everyone is involved.

The Purpose: Build communities of inquiry to help people and their companies stay ahead in a rapidly changing society.

Observations of the problem [Verbose Version]

Retreat deals with ambiguous uncertainties.

The information age has enabled many disruptive innovations that have improved our comfort, convenience, and quality of life. Yet these technologies have also disrupted our societal norms, giving rise to new risks, uncertainties, and the fear of being left behind. Every sector – whether healthcare, energy, agriculture, retail, hospitality – are struggling to integrate the new realities of blockchain, IoT, 5G, drones, 3D-printing, artificial intelligence, and other emerging technologies. Every person – whether CEO, mid-level manager, or current student – is struggling to stay relevant and bring state-of-the-art knowledge back to their organizations.

The internet has democratized data, giving individuals access to information and ability to communicate with anyone. The individual has un-parallel power to pick their own path, choose their own friend groups, and live wherever they wish. Unfortunately, having the power to choose “what we want” implies that we actually know “what we want” in the first place. Finding out “what one wants” is a long and personal journey, one that used to be accompanied by mentors, friends, and other long-term advisors. Today, many people who are searching for their careers have very few options to turn to because of the scarcity of those relationships.

While our access to data has increased, our human-to-human interactions have become increasingly transactional. We optimize for collection of business cards at networking events rather than develop deep business relationships. We have hundreds if not thousands of connections on Social Media yet complain that meeting new people for dates is reduced to “swiping left or right”. People jump from job to job because the transaction cost for the individual is low enough to try to find the “dream job” instead of developing into one. This has caused companies to extract the most out of their future employees by writing pie-in-the-sky ideal job descriptions, knowing that the hire will only have an average 2-year tenure before moving on. Given that it takes an average of 6-months for a new employee to acclimate to a role, that means a company can’t afford to hire the “wrong” person. The individual, with their power of choice, is left to their own devices to develop their careers and accumulate their successes. This increase in individual power has come at the price of community responsibility.

Business is conducted through trust and relationships. Even online services build trust behind their brand to gain trust from consumers. When that trust is betrayed through bad products or other events, the business suffers. Yet even behind trusted brands are teams that need to be responsible to the trust vested in the brand. As a person gains responsibility for larger budget and larger teams, they need to convey trust through their relationships to succeed in their responsibilities. Unfortunately, relationships don’t scale with a hockey-stick like tech companies. They take a long time to develop. They change over time as they mature. I have noticed that, despite having strong relationships in my every-day life, I find a deeper connection with people I’ve known for a longer time, even if I have not spent as much time with

them. I have also noticed that, having lived in several cities, I don't feel like I'm part of the city until I get to know some of the generational families. Longevity of relationships matters more than we appreciate.

Although the digital age has helped create new global tribes based on personal preferences, buying habits, and philosophical ideas, it has also created a world of echo chambers that decrease exposure to people with different frame of references. Increasingly, people don't even know what they don't know because the opportunity for interactions with diversity of backgrounds are limited. As companies become more global and our world becomes more interconnected, these unknown unknowns are becoming a new risk that leaders need to manage.

The innovation retreat helps individuals, corporations and organizations regain exposure to memetic diversity by convening a group of individuals that are purposefully outside of one's tribe. The inclusion of background diversity and a variety of frame-of-references makes the program an ideal venue to seek commonality amongst the most puzzling, paradoxical and wicked problems of our times.

Properties of the approach

The retreat focuses on asking the right questions. The thesis is that we all share the same fundamental problems, but we may have different sector-specific jargon to describe them. So instead of focusing on solutions, which assume the same frame-of-reference, the retreat focuses on framing the right question so that participants can agree. As a result, participants should create lasting relationships with a weekend structured to promote curiosity-driven conversations, passing of knowledge to others, and the creation of shared experiences.

The Retreat: Grounded in the values of *innovation*, *authenticity*, and *paying-it-forward*, the retreat is a weekend where sector leaders can stay ahead by discovering that solutions to one's problems may already exist in someone else's sector. We focus on how technology as tools *should* be applied to address societal quandaries. The retreat finds common grounds in our mutual challenges by being:

- **Inclusion Driven** – Innovations emerge through diverse collaboration and the retreat strives to increase memetic diversity, including attendees from a large variety of backgrounds and frame of references. Past attendees have spanned experiences and age (CEOs to undergraduates), industries (utilities, grocery, biotech, social enterprise, non-profit, etc.), economic status (low income to angel investors), geography, race, and ethnicity. Thirty percent (30%) of the tickets are allocated to students and scholarships are available for low-income individuals.
- **Curiosity Driven** – The right solution falls out of asking the right question. A select number of speakers will give keynotes with 15-minute talks addressing the following questions:
 - How can technology support inclusive growth?
 - How do we continuously reinvent ourselves and our organizations?
 - Who are our neighbors, in the era of globalization?
 - How is the experience of narratives changing over time?
 - How does mentorship evolve in the gig economy?
- **Participation Driven** – Most of the formal time will be in breakout sessions that revolve around other questions. A significant amount of time will also be Informal – including meals, breaks, snacks, walks, and other opportunities for natural collaborations to emerge.

Retreat Message House - Values

(Last Update 10/19/2018 by JJIA)

Creating communities that matter through innovation, authenticity and paying-it-forward

- **Creating space** for genuinely surprising outcomes of **Emergent Innovations**.
 - Mutual **exploration** of the boundaries of what's possible, probable, and preferable
 - **Discovery** of new ideas through dialogue and the **synthesis** of many conversations.
 - **Inclusion of ideas** who are not normally found in one's circles.
 - **No assumptions** – every story is important and unique.
- **Engaging in Authentic Curiosity** to question and to seek commonalities in questions.
 - **Structured dialogue** with like-minded self-improvers even though there may be differences in the experiences, value systems, and future hopes and dreams.
 - Seeking out **highest quality** people to set the bar of what's possible.
 - Strengthening one's own **emotional certainty** and maturity.
 - Freedom to ask **questions** and pursue **inquiry**.
- **Leaving each person better than when you met them**.
 - **Life-long learners** who believe that there is much to be learned from those with different experiences.
 - **Improving** the lives of economically, racially, and other disadvantaged groups through intentional and **inclusive programming** and outreach.
 - **Passing on knowledge** to those who don't know yet, whether generational or sectorial.
 - **Building responsibility** and trust toward each other within this community and towards other communities that people are a member of.
- **Convening** a community that seeks each other out and has **"fun"** together.
 - **Accumulating memories**, shared experiences, and moments of discovery.
 - Supporting and **celebrating** the differences within the community.
 - Committing to the **"long-tail" of relationships**, ideas, and dialogue.
 - Enabling people to **take ownership** of their ideas to develop as one pleases after retreat.

The ingredients for a successful weekend

There is nothing more fun and bonding than a good game. Innovation, like a memorable game, comes from the shared experience of the drama unfolding in real time. Therefore, in treating innovation-as-a-game, we hope to create a space where individuals can emerge as leaders, ideas deep in one's mind can percolate through the surface of action and create memories worth remembering.

Emergent innovation is a form of combinatorial thinking, a churning of ideas to generate new connections not previously observed. The outcome of this type of innovation cannot be predicted but the ingredients are the same – diverse group of individuals, opportunity to self-organize for unlikely connections, and permission to create something new. Therefore, the purpose of this game is to provide a safe environment groups of curiosity-driven individuals to take advantage of the opportunity.

Some of the ingredients are:

- **Content:** The purpose of talks is to seed the room with ideas, problem statements, or inspirations that can be discussed in breakout sessions
- **Light Structure:** The format of the conference will be “Meals with Breaks” to provide ample opportunity for random conversations and connections. This is to provide just enough activity to keep people from being bored and just enough free time to encourage attendees to explore beyond the prepared content.
- **Curiosity:** Breakout sessions will be created around questions to be explored rather than topics to be taught.
- **Atmosphere:** The conference should take place next to nature – water or mountains. This is to give the atmosphere to connect with the world we live in.
- **Diversity:** Invitations will be intentionally invited to people with a wide range of background and contexts. Examples of these may be range of age, demographics, seniority, geographic, ethic, racial, economic, industrial, and political.
- **Community:** Circle is a mechanism to promote community discussions.
- **Responsibility:** Attendees have permission (and an encouragement) to create or lead in any direction they need. All exploration is valid. Therefore, the responsibility of being innovative rests within each individual.
- **Modeling of innovative behavior:** Innovation cannot be taught. Rather, it can be identified, praised, and encouraged.
- **Logistical transitions:** Organizational planning should revolve around the transition points between time and place. Attendees should know that all hours are *accounted* for, even if the time is free time.
- **Gamification:** Activities should be encouraged or discouraged by creating incentive structures. Few activities, if any, should be mandatory or outright banned.

Metrics for success: The best metrics to use are those that are about good pedagogy. These are teaching people how to teach, teaching people how to learn, how to be curious, how to practice and hone their skills, taking ownership of their consequences (both successes and failures) and being there to tell stories about it.

- **Long Tail:** People continue to talk about the retreat, continue to meet, or collaborate on projects well beyond the formal end of the weekend.

- **Returning Attendees:** People come back for future programs.
- **Self-sustaining:** The program generates enough money to perpetuate itself.
- **Self-replicating:** Attendees become interested in organizing their own retreat following these rules.
- **Discovery:** When people are taught a lesson, they may forget it. When people discover a learning, they take ownership of it and will remember it for longer.
- **Empowerment:** Attendees feel like they can go 'do stuff' afterwards.

Things to avoid: Bad teaching practices

- **Being Prescriptive towards a goal:** It is very tempting for an organizer to say, "I want attendees to all come up with great ideas" or "I want attendees to all do ____". These become prescriptive activities instead of letting things happen. In fact, any introduction of a direction may have the risk of limiting innovative thought. Furthermore, we run the risk of attendee not doing the activity, not enjoying the activity, or "breaking" the intent of the activity. This can result in a very frustrated organizer and an unsatisfied attendee. There are several solutions to this
 - **Be surprised by what actually happens:** As exciting as it is to plan for an outcome, the organizer also needs to keep an open mind that things will always progress differently than what's planned. Therefore, the less scripted the plan, the less disappointment when things don't go as planned. This can make organizers uncomfortable! However, in sticking with bringing the ingredients of innovation together, the organizer can add to their experience by being surprised and excited with what emerged as well.
 - **Create the environment for your activity to happen on its own:** If organizers want people to spend time on the beach, prepare picnic baskets for one of the breaks and let people loose. If organizers want people to work on entrepreneurship projects, have Tribal Elders agree to do 1-on-1 mentoring sessions with those who sign up. If organizers want to encourage mixing of people, create a mini-game where you gain 1 point for each new person you have a meal with and no points for someone you've already eaten with.

Rules

*These are lessons learned from many years of producing events, teaching classes, and running retreats. Thus treat these "rules" as *highly* suggested best practices that brings out the magic of Innovation Retreat.*

- **Location of retreat:** The retreat should be in a setting that takes the participants away from the daily pulses and pressures of life. Ideally, it should be located next to water or mountains.
- **Length of weekend:** The weekend should be long enough such that if a participant chooses, they can plan the weekend into their vacation schedule. Attendees have brought their spouses and kids before, even if they do not participate in the weekend.
- **Start/Stop:** Weekends should start Saturday morning and go till Sunday noon or early afternoon. Ideally, there will be an informal dinner for the organizers, speakers and facilitators on Friday night to kickoff the weekend.
- **Duration of activities:** Activities should give attendees plenty of room to digest the conversations, explore new ideas, and always have something new to do. Each activity should be no more than an hour. Each activity should be separated by 30 minutes. Lunch should be roughly 1.5 hours. A day's schedule should be roughly 8 hours.
- **Questions-Oriented:** Every talk and breakout sessions should revolve around questions rather than topics. This creates the space for conversations to take unexpected turns as the participants seek to answer the question or to ask related or clarifying questions.
- **Circle:** Each day should start and end with the community convened. Use the format of Circle (Appreciations, New Information, Puzzles, Problems with Solutions, Hope and Dreams) when the community is convened. It is OK to use a subset of the components to save time.
- **Number of Participants:** There is an ideal number of participants to create an environment where one has the time to have a conversation with everyone without feeling hurried or pressured to move on from their current conversation. Minimum participants: 50; Target participants: 75; Maximum participants: 100
- **Number of Facilitators:** There should approximately 1 facilitator per each 15-20 attendees. Four facilitators seem to work well in most situations and a fifth facilitator may help manage retreats that are nearing 100 participants.
- **Number of Speakers** The talks are meant to seed ideas for the breakout sessions and other discussions, not to teach a lessons per se. There should be at 4-5 speakers per retreat. Talks should be no more than 15 minutes with an additional 15-minute Q&A.
- **Ticket Pricing:** Ticket prices should be inclusive - set at a level that is reasonable to recoup the cost of the weekend and affordable to achieve accessibility across economic demographics. In 2018, we charged \$350 for a full-priced ticket. In 2020, we charged \$25 for an online retreat.
- **Student Discounts:** Students should be subsidized so that it enhances their studies. Each event should target 30% participation from students. Their tickets should be priced at 75% discount from retail rate. At Cannon Beach, we also rent the students a beach house and include student housing as part of their ticket price. If a student does not require housing, we only charge \$50.
- **Additional Discounts:** At the organizer's discretion, each event should have a small scholarship fund to give discounts or scholarships to those that can't afford to attend.

Character Sheets

Descriptions for each individual person, such as personal motivation, goals, bias, etc. Why is each participant here?

People are coming to the game as themselves. Therefore, organizers need to nudge the individual to come with some notion of what they want. This will help 'define' the weekend, give some form to the weekend, and seed the organizers with ideas for games to mix people together.

One suggestion is to have open-ended questions during the registration process prompt some thoughts. Example short-answer questions could be:

- Finish this sentence: I wonder what would happen if _____
- Finish this sentence: The 5th grade me would think of me today as _____
- I would like to teach _____ to others at the retreat
- I am recently puzzled by _____. Why does this happen?
- What are three hobbies you have or want to learn?
- Where were you born and where do you live now?
- What did you study and what do you do now?

Blue Sheets

Groups represented at retreat and their roles. A character can be in multiple groups

Hosts

The host is the anchor of the community culture. This person is ultimately responsible for guiding the retreat process from start to finish, a 6 to 9-month process. The host needs to make sure the rules are followed, and the retreat organizers stay within the framework for Innovation-as-a-Game. Frequently, this person will need to manage the tendency to be prescriptive for an outcome by all other organizers. This person needs to be deft at crafting mini-games, incentives, or rephrasing goals as questions to keep the innovative spirit dynamic.

The host needs to recruit the team, invite the speakers, facilitators, run sponsorship, manage operations, and whatever else needs to get done. The goal is that the Host does most of the legwork so that during Retreat, the Host can be a participant. Post-event, the host should also host a debrief, run the surveys, and get feedback for how to improve future programs.

Organizers

Organizers are the keeper of logistics to make sure the retreat runs well. These people need to make sure There may be sub-categories of the organizers, namely

- Executive Director – Person who keeps the organization running, project manager, makes sure we are on track. Things like book the venue, arrange food, etc. This person is also responsible for the pre-event
- Event Organizer – Person who keeps the event running during event. Liaising with conference center, vendors, etc. during the event. This may be akin to the Stage Manager in being the person responsible for making sure the actual event runs smoothly.

Facilitators

Facilitators are the bread and butter of the weekend. They run circle. They run breakout sessions. While the Host may be the anchor, the facilitators need to be the ‘heavies’ of the community culture. Attendees who are uncomfortable with the format, content, or the retreat, need to feel comfortable turning to the facilitators for guidance. These people need to be prepared to be the emotional guides for the weekend. Thus, a successful facilitator needs to be trained in Circle, conflict resolution, coaching, and leadership.

Ideally, there should be a Head Facilitator

- To help recruit, organize, and manage the facilitators at the retreat
- Assigns facilitators to Corporate ticket buyers to develop a Question for their breakout session(s)
- Assigns facilitators to an operational task to help run the weekend
- Assigns facilitators to run a group Circle

Speakers

The speakers inject creative ideas into the audience. These are at the forefront of their field or have inspirational stories to tell. Generally, speakers should have 15 minutes to talk and 15 minutes for Q&A.

Since the purpose of the talks is to seed ideas, attendees can continue conversations with the speakers during the rest of the weekend.

Speakers should come from a wide range of backgrounds, each have something different to contribute. Speakers that have managed teams tend to have wise words. Speakers that have gone through a unique experience need to focus on their storytelling. They should be booked and their names advertised on the registration page.

Tribal Elders

While facilitators are formally modeling the culture, the tribal elders informally reinforcing the spirit. These people act as small group mentors, have deep experiences to share, and can be a catalyst of permission to getting things done. Frequently, these people do not have a formal role, can be repeat attendees, and help reinforce the fabric of the community.

Corporate Sales

These are individuals or organizations who want to contribute a question or curiosity to the group to see what the retreat attendees can come up with. The questions should be modified to be open-ended enough to create fruitful thoughts but not so open as to have no action-items result from the discussion.

Volunteer and Student Organizer

- To manage people who are coming on discounted tickets for a small role in the retreat. These roles will be either as a scribe during a Circle or Breakout or to help with Registration desk.
- Maintain and manage a central source for taking of notes (create and manage templates; For example, decision to use Word, Google Doc, Dropbox, etc.)
- Assign people to each circle and breakout to scribe
- Assign people to registration desks.

Housing Organizer

- To help manage student housing.
- Pickup key and check-in on Friday.
- Assign students to their location and beds.
- Check out of the house on Sunday morning and return the key.

Registration Organizer

- Run the registration desk and manage the volunteers
- The registration desk will be the “Information Center” for the retreat, including documentation for
 - The program
 - List of restaurants
 - What evening activities are planned
 - Name Badges
 - Printer

Inclusive Groups

The more experiences, opinions, and puzzles present, the more likely innovations will emerge. Therefore, the hosts and organizers should be intentional in including people from as many different

groups as possible. Principles of inclusion should influence the distribution of invitations to attend the event as well as the speakers and facilitators. These include:

- **Age groups** – Students, mid-career, executives to retirees. One observation is that when students are present, the professionals feel more at ease in sharing their ideas and the students lift their game to behave more professional.
- **Sector groups** – All industries suffer from the same problems, whether access to talent, energy, food, water. Therefore, bringing leaders of different fields together creates the opportunity to learn from adjacent sectors on how they solved their problem. Example sectors include health care, energy, infrastructure, government, pharmaceutical, social media, banking, and others.
- **Ethnic groups** – How one is raised gives texture to one's opinions and thought. Therefore, including people of different ethnic backgrounds can elucidate approaches that may not be obvious at first glance.
- **Economic groups** – Regardless of economic standing, everyone is trying to make a better life for themselves. One's economic status may dictate where they can go next. Having the voice of challenges faced by different economic status may indicate where there are structural problems that can be addressed through innovation.
- **Gender** – men and women see problems differently and approach solutions differently. These differences need to be voiced and contributed to the community.
- **Geography** – Attendees should be a mix of attendees from across the USA, if not international.

Green sheets

These are the Processes that happen before, during and after a weekend retreat

Question Formulation

The formulation of question is an important step of Retreat. Most questions being asked today at conferences revolves around topics or technologies. Unfortunately, these are merely tools. Tools by themselves have no value unless they are applied to solve a problem. Societal fundamentals have never changed – trust, relationships, quality of life, peace, prosperity – are just a few values societies seek to improve. The questions should be as “timeless” as possible and captures problems faced by multiple industries. Many industries should share the core value and there should be many technologies or methods that could address the problem. The values of retreat – innovation, authenticity and paying-it-forward – offer a grounding for question formulation.

Example question:

Innovation

- How has trust been reinforced or eroded through technology?
- How is the disruption of geographical boundaries affecting relationships?
- How do we manage the disaggregation of information?
- Will the shift towards capital control of the economy allow for entrepreneurial endeavors?
- How does the gig economy impact innovation?

Authenticity

- How do leaders improve themselves?
- How do ambitious people avoid becoming complacent?
- How do you know when your opinion is wrong?
- Is there value in exploring the wrong answer?
- Do we need better problems to solve?

Paying-it-forward

- How do communities improve their longevity?
- How is mentorship going to evolve as technology evolves?
- What can I learn from people younger than me?

Meals with breaks

The structure of the weekend is “meals with breaks”. This is a loose guideline for the pacing of unstructured interactions interspersed with structured seeding of ideas.

Circle

The value of Circle is that it avoids a culture of complaints and creates a culture of co-creation.

Circle Process

Bainbridge Graduate Institute/Pinchot University/Presidio Graduate School Seattle

Updated April 2017 by Lisa Capa with feedback from Mary Kay Chess and modifications from Jimmy

https://www.amazon.com/Surprising-Power-Liberating-Structures-Innovation-ebook/dp/B00JET2S76/ref=sr_1_1?ie=UTF8&qid=1503517191&sr=8-1&keywords=liberating+structures

Circle is one of the community processes that we have at PGS Seattle that helps to create a culture of gratitude, collaboration, transparency, support, and inspiration. This is an ancient tradition and means of gathering diverse voices together to ponder, meditate, surface and resolve issues and offer reconciliation in addition to building a healthy and nourishing culture.

Each section of circle is described below. (This was adapted from a Pinchot University Community/Alumni Facebook post. Sorry I can't remember who did the original post, but it was in conversation with Jill Bamburg.) The sections are listed in the order they are done. You can see that the whole person is engaged in this process: head, heart and body.

- **Silence** – As individuals gather in the space for circle, we ask for a spirit of quietness and allow up to two minutes of meditation or silence as we move to presence in the room and in the community.
- **Appreciations** -- Always first (and always first thing in the day) to establish a culture of appreciation (gratitude, positivity, etc.) This sets the tone for everything else that follows in the circle, the day, the organization, etc. A refreshing difference from the normal culture of daily life! Own your appreciation: *I appreciate*.
- **New Information** -- Announcements. But how refreshing that these come second, not first! We keep these short and avoid them if they are noted elsewhere. What is critical is the essence of this section.
- **Puzzles** -- In this community, this is frequently used as a "lost and found" bucket, but its higher purpose -- sometimes observed -- is to ask open-ended questions that don't necessarily have a response, but that raise important issues. Example: We say we are committed to diversity, but there is a certain sameness to the people who come here. My puzzle is "Why?" and whether there is something we're doing that's creating that fact -- and whether there's something we might do differently that would change it.
- **Problems with Solutions** -- This is NOT the same as "Puzzles," although the two seem to be frequently compounded in our practice. To me, the requirement that we offer solutions when we offer problems is what keeps us as a community from generating into a "culture of complaint." If you can't come up with a solution, then perhaps you really have a "puzzle." But if you observe a problem, this element forces you to accept the responsibility for at least proposing something that you believe would help to solve it.
- **Hopes and Dreams** -- again, what a lovely way to start the day!

On Thursday through Saturday of an intensive, the circle process is done in the order listed above. At closing circle on Sunday, the order is changed a bit to end on matters of the heart: silence, announcements, puzzles, problems with solutions, appreciations, and hopes and dreams.

Comments on Circle (Opening and Closing) and Kaizen

The following comments on circle and kaizen are opinions held by Lisa Capa and not necessarily opinions held by anyone else. They are based on personal engagement in the circle and kaizen processes in the BGI/PU community since 2004, and on recent conversations with people in the community during the cultural transition to PGS Seattle (which, as of April 2017, is currently happening).

1. Circle and Kaizen work together to help to support the spirit of co-creation and the building of solutions and approaches to the gnarly problems facing us in the academic and work environment. Some members of PGS note that it may minimize a culture of complaint.
2. The connection between circle and kaizen is as follows: puzzles/problems shared that need more time for discussion than circle allows get put on the list of topics to talk about in kaizen. The leaders of kaizen engage in a process to decide which topics on the list get worked on in kaizen (sometimes the decision is made by majority or consensus vote by participants in kaizen, sometimes the leaders themselves decide). When a topic is resolved, or is sufficiently discussed, this information is shared back into circle. Sometimes a topic requires the formation of a disappearing task force.
3. One major factor that contributes to the success of circle and kaizen is that people, who have the authority to shift resources to help make things happen (“resource people”), participate in both circle and kaizen. By having resource people regularly attend, engage, and not dominate circle and kaizen time, other people are more empowered to share their perspectives, issues, comments, and proposed solutions. From a systems perspective, the entire system is in the room and, we are demonstrating participatory democracy and a flat decision making process, often a rare occurrence in many organizations.
4. As the cultural transition to PGS Seattle continues and without regular attendance by resource people, we can expect our engagement in and the effect of circle and kaizen to change in new ways.
5. Questions to sit with:
 - a. In what ways will these processes change? And what will the effect be on our community?
 - b. How can we continue to minimize the culture of complaining as attendance in these community processes change?
 - c. What might we do to make attendance in these processes more attractive?
 - d. What have we done with the PGS community to share the benefits of these processes?
 - e. What other questions should we be asking?

Talks

The purpose of the talk is to seed ideas. These should be short enough to inspire the attendees who can then discuss further in their breakout groups or during informal time. Generally speaking, talks of 15 minutes long with 15 minutes Q&A is sufficient.

Registration Desk

An often overlooked, yet important component. The registration desk is the central location, a clearinghouse of information. This can be logistical (when’s lunch?) to the base of supplies (post-it notes), to answer whatever questions come up. Hosts, facilitators, and organizers should frequently check in on the registration desk.

Meal signup sheets

It's always nice to explore the local scene. People should be free to sign up to go to a restaurant for lunch or dinner. This will also help spread people out so that the attendees don't overwhelm one restaurant.

Carpool signup sheets

Retreat begins and ends in the carpool. This is frequently when teams form and bond. Previously, we used <https://www.groupcarpool.com/> to organize the carpools.

Housing

Where people stay. This process needs to be refined a bit. We ran into issues with people renting their own hotels, renting B&Bs, houses, such that we lost track of who was going where.

Evening Activities

Organizers should have a few evening activities planned or prepared just in case we need them. Attendees will be encouraged to organize their own but a few should be planned as seeds as well.

Locations

These are the places where innovation can happen. Sometimes attendees need to know what is going on where. Other times, attendees need to know that the option is there.

Main hall

There needs to be a room that can fit all of the attendees at once. This will be used for the community circle.

Breakout rooms

There needs to be a breakout room per facilitator.

Options Restaurants / Pubs

Organizers should compile a list of restaurants, pubs and prepare sign-up sheets. This may encourage folks to form their own groups and explore the area.

Inns / AirBnB

Organizers should have an understanding of where people will generally stay.

Facilitator / organizer house

Activities can be planned around these house.

Registration Desk

May have things like

- Name badges
- Programs
- Printer/stapler/other stationary
- Square (for late arrivals or additional purchases)
- Meal signup sheet

Cars

Is there generally enough capacity to move people around at retreat? Are all activities happening in one location or spread out around the area? If spread out, do we have transportation options arranged?