

Assemble Community →			Converse →	Form Consensus →		Collaborate →			Create →	Change →
Identify	Recruit	Schedule	Voices	Values	Vision	Achievements	Situation	Priorities	New Initiatives	



### What do You and your Community care about?

When organizing a Community engagement (C<sup>e</sup>) event, try to use neutral language for topics. Avoid wording that is biased towards a particular viewpoint or solution. “**What should we do?**” is better than “**Validate this plan**” or “**Agree with me.**”

**Identify** and invite individuals that reflect all perspectives. Include sources of conflict.

Include as many **external stakeholders** as possible. They can provide independent perspectives, expertise, warnings, alternatives, solutions, and support.

**Recruiting, Scheduling**, and getting people together are the hardest parts of the process.

Groups can articulate their shared vision in an afternoon or evening. Weekends are recommended for the full planning process. Most groups benefit from having discussions scheduled for two consecutive days.

The critical stakeholders drive the schedule. For larger groups, expect about a month to find a free date. Invite the other identified stakeholders, but accept that some may not be able to attend.

Smaller groups, around a dozen, find focus but may have limited resources for execution. Groups of **25-50** typically comprise enough critical mass to ensure success. Groups of 100-300 can create truly-transformative change.

C<sup>e</sup> alternates between sub- and full-group conversations. Remix subgroups for each cycle. Virtual subgroups benefit from having experienced facilitator-scribes.

The number and size of the subgroups are pretty flexible. I start with the square root of the full-group (e.g., 25 participants → 5 subgroups of 5 people).

For leaders and facilitators, less is more. Listen. Ask.

Ask each participant to introduce themselves “**like nobody in the room knows you.**” Ask each “**Why is this conversation important?**” and to describe their “**big ticket item**” — the one thing that will make them **thrilled and energized** to walk out at end of day having achieved.

Conclude introductions by asking “**Who else should be involved in this conversation?**” Ask participants to use a sheet of paper or chat to note the **Voices** that should be added to future conversations as they think of them.

**Values** are abstract, one or two-word phrases that describe goodness. Form subgroups and ask each to list “**the core values that should guide all decision making on this topic.**” Everyone should be able to see themselves in the list of values.

Ask each subgroup to pick a speaker to voice their values to the full group. Provide some time to discuss. Ask the full group “**Which values really resonate?**” Highlight those terms.

Reform the subgroups and ask them to articulate **Draft Visions**.

“**Go to the future. Turn around and look back. Describe success. Walk back to today. What do you see? Paint the dream in terms of what’s been accomplished. Describe results, not what was done. Say what has happened. Write in past-tense, not future-tense.**”

The planning horizon (X years) should be far enough out that current limits are irrelevant and anything is possible. **Ten years** is a good starting point.

After draft visions have been discussed, ask the full group to identify the **most compelling ideas** and highlight them.

Send the speakers to a separate workspace to integrate the draft visions into a single **Shared Vision**.

Discuss the shared vision. Ask if anyone chooses to **veto** it. A little offline editing is common.

While the speakers are consolidating the shared vision, have the other participants split into subgroups to list **Key Achievements** and identify additional voices.

“**What needs to be done to accomplish the shared vision?**”

Articulating the key achievements and reviewing / approving the shared vision completes the first half of the process, which typically takes from ½ to a full day.

The second half of the process, solution development, starts by taking a close look at the **Current Situation**. This is where you “**program the collaborative computer**” with the information needed to prioritize and resolve issues.

Each subgroup gets a different topic. Topics can be anything that the group needs to understand. Common topics include:

- Strengths and weaknesses
- Opportunities and threats
- Other perspectives and voices
- Critical behaviors
- Knowledge gaps

After subgroup reports and discussion, the next exercise is for subgroups to identify and **Prioritize** the top-three barriers, bridges, and critical success factors.

During the subgroup reports, have each speaker cross items off their list when they’re mentioned by a prior speaker. You’re shooting for a list of **4-5 top issues**.

Note that issues are discussed **after the shared vision** has been negotiated. Real and potential conflicts are discussed in the context a mutually-desired end state. This sequence increases trust, reduces fear, and enables collaborative, creative problem solving.

Assign each subgroup a different issue, with the task of identifying short- and long-term **Initiatives**. Report and discuss.

Communications typically improve immediately, as the participants have **created a meaningful language for success**.

C<sup>e</sup> can dramatically accelerate **Change** by resolving conflicts and energizing teams to work independently — enabling individuals to **autonomously-create aligned, strategic change** as opportunities present themselves.

The shared vision is often accomplished without written reports, in about half of the time of the planning horizon.

*“We must find secular ways to cultivate warm-heartedness — to educate ourselves about inner values. The source of a happy life is within us. Troublemakers in many parts of the world are often well educated, so it’s not just education we need. **We must pay attention to inner values.**”*

— Dalai Lama

*“...when people are made afraid, their amygdala starts firing and their prefrontal cortex literally is starved of blood. You can’t have both things [fear and logic] going. And so if you’re asking people to sort of be in their rational brain..., then you need to present this as the **possibility of creating something good...**”*

— Anat Shenker-Osorio