

International Association of Facilitators Conference

The Art and Mastery of Facilitation: Bringing Ideas to Action

March 8-10, 2007

Collaborative Inquiry:

A Powerful Way of Learning Together

Session Proceedings

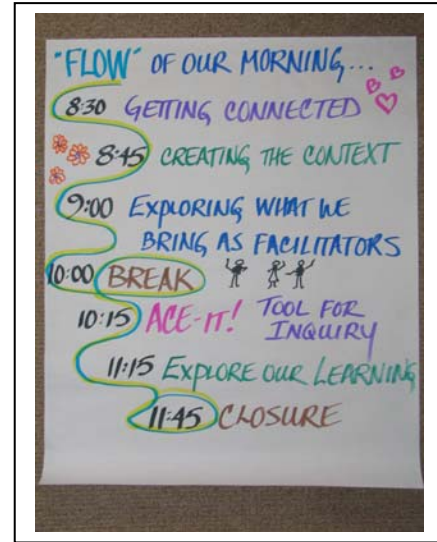


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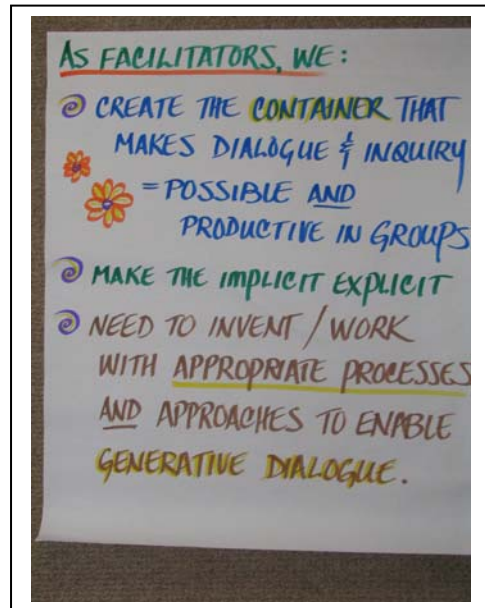
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The Context

The IAF conference in Portland [March, 2007] provided an opportunity to explore and share the power of collaborative inquiry. The Ginger Group Collaborative's inquiry processes draws upon rich theoretical and practice-based experience to enable participants to assess complex issues and generate innovative ideas grounded in their own experience and wisdom. The inquiry process is emergent, creative, and deepens learning in complex environments.

Consistently we encounter the growing complexity of our times, our organizations and communities that challenges us to be both facile and comfortable with the unpredictable—to recognize genuine opportunity as it emerges and invite those we are working with to join in the co-creation and learning of the moment. We intended to offer our colleagues an experience and a means to investigate a self-directed learning process, to advance our mutual theory-building and practice in complex environments.

We use inquiry as it has evolved in practice [drawing on our facilitators' work in organizations and communities with AI, large group processes, dialogue, mutual inquiry, organizational transformation]. We have witnessed that, from within a collaborative inquiry, it is possible to shift common mindsets that tend to focus on “fixing” problems to ones of exploring multiple frameworks of meaning to create new possibilities. The half day session invited experienced facilitators to explore self-organization where responsibilities are shifted to the whole group by eliciting and drawing upon the resources within the group.



Exploring System Engagement and Emergent Design

The Power of Inquiry

Inquiry creates the ‘container’ where structure meets fluidity, where we can create opportunities to be engaged in active learning based on our own questions, where we are open and curious to new perspectives. Inquiry is valuable in working with complex and interdependent issues where no one individual “knows the answer,” and where the only viable option is for groups of informed and committed individuals to think together to arrive at new insights. The inquiry space is loosely structured and flexible.

- It builds on our different ways of knowing – through mind, body and sensing capacities.
- The inquiry is a time to:
 - connect with what’s important – individually and collectively
 - reflect, listen, probe, wonder and explore with others
 - draw on the wisdom of the collective
 - build and deepen relationships to create a community of support and learning
 - develop fresh insight into your work with the possibility of joint action with colleagues.

Working with Dialogic Processes

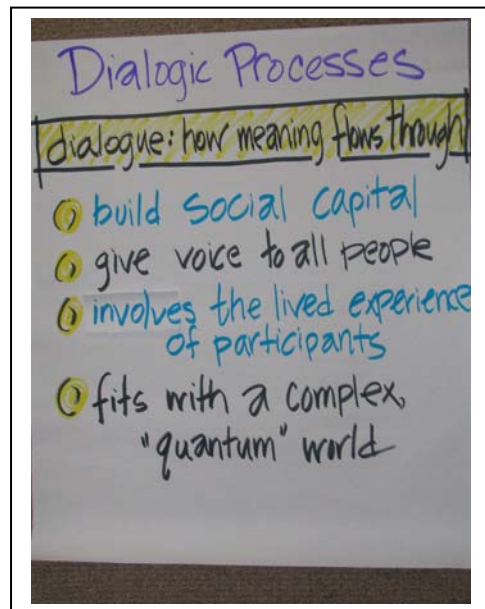
How can facilitators encourage groups to create change? At the heart of this way of working and 'being' is dialogue and an exploration how individuals communicate in meaningful ways. The word dialogue stems from the Greek word referring to how meaning flows through. Dialogue has been an essential element to engaging adults in learning since ancient times. A symbiotic relationship is created between the participant and facilitator that hinges on mutual respect and working collaboratively. Dialogue becomes a means of building social capital and giving voice to the people that typically do not have a voice. The focus is on encouraging participants to consider the application of the ideas and the personal significance to their own contexts.

It is through sharing perspectives that people are able to understand the assumptions and frame of reference that they may take for granted. The facilitator/educator must help people acquire the skills, sensitivities, and understandings essential to become critically reflective of assumptions and to participate more fully and freely in critical-dialectical discourse. Given this context, individuals are more likely to have a transformative shift in the learning, either for themselves or for the collective group. This involves becoming more critically reflective of assumptions supporting one's own beliefs and those of others and more discriminating, open, and disposed to transformative learning.

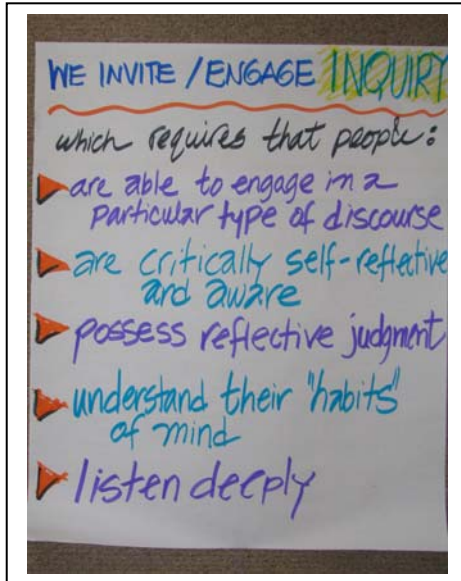
Dialogue is a practical way for groups to reflect and tap into the wisdom of the group: dialogue that is grounded in reflection and inquiry skills is likely to be more reliable and less dependent on particulars of circumstance. The central purpose of a dialogue is to establish a place of genuine meeting and inquiry, which we call a container, a setting in which people can allow a free flow of meaning and vigorous exploration of the collective thoughts, personal perspectives, and the rigid features of their individual and collective assumptions.

Certain conditions encourage inquiry. Firstly, participants must learn to suspend their assumptions rather than engage in discussions or negotiations. Secondly, all participants must be regarded as equal. Thirdly, a facilitator is needed initially to hold the space for the dialogue. Fourthly, listening and observing are critical to discovery. The orientation is in the present with a purpose of creating a setting where generative thinking and collective wisdom can emerge.

Initially, people new to the dialogue process need assistance in the process and a skilled facilitator can be a guide. An open or empty space is needed to allow dialogue to flow. Round tables and open circles support the non-hierarchical principle and practice. The facilitator must practice the conditions for inquiry themselves: letting go, suspending judgment, being self aware, presenting a clear intention and being open to what emerges. When we do this, we transform the social field from judgmental habits of thought towards inquiry and accessing the not-knowing dimensions of who we are as human beings. We encourage the emergence of the capacity for collective wisdom in human communities to evolve towards higher order complexity.



Transformative Learning in Community: Collaborative Inquiry



For the past several years, the Ginger Group Collaborative has been developing an approach to collaborative inquiry. We believe in the lasting benefits of bringing many minds together:

“collaboration is, we think, the fabric that underpins thriving communities and great workplaces. Collaboration is not just a passing fad - it is here to stay as a way of achieving something bigger than any individual can achieve on their own”.

A collaborative inquiry is a gathering of people who share a deep interest and passion for an issue. It is an exploration, a journey of discovery and a powerful way of learning through surfacing burning questions – those questions that most matter to us right now.

Participants work together in a spirit of openness and engagement. The inquiry draws on the wisdom and unique perspective of every participant, to deepen or

expand the collective understanding of a profound question or issue brought by participants or the conveners of the inquiry.

A collaborative inquiry is an intimate setting, inviting full self-expression and engagement. It is designed for people who are open to new ways of thinking and to other viewpoints—people who are willing to push their own thinking and to nourish the dynamic tension that can accompany a shift in one’s mindset and perspective. The inquiry space offers a genuine opportunity to co-design and share in a self-directed learning and emergent process.

A Summary of the Session

This session was an experiential inquiry into the practice of facilitation, weaving together the principles and practices of dialogue and facilitation. A collaborative inquiry is an emergent process that is both unpredictable and synergistic. The learning intentions were to:

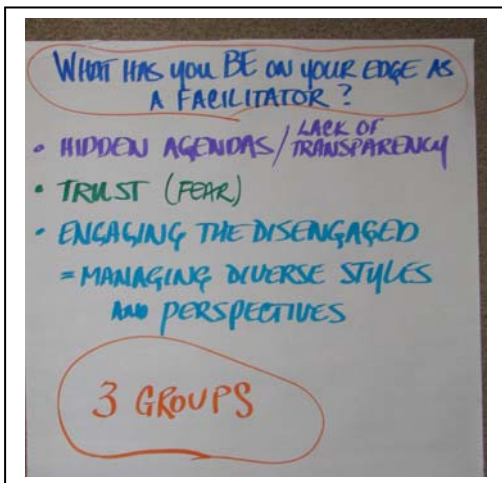
1. Experience how an inquiry environment draws forth innovative thinking, methods, and renewed courage to tackle big issues and complex situations
2. Explore personal learning edges from multiple perspectives of facilitators, peers & clients
3. Learn to use tools, including **ACE-it** to explore ideas and build peer to peer collaboration
4. Engage in a refreshing, stimulating exchange that provokes emergent learning.

Our commitment, both in the session and in our practice, is to support facilitators to explore the edges of their learning and to develop the skillful means to use dialogic processes effectively. We introduced two tools, Freelisting and ACE-it.

1) Freelisting - from SAS²(Social Analysis Systems), is one of a powerful set of concepts and techniques for collaborative inquiry and social innovation. SAS² applies dialogue and structured thinking to create solutions appropriate to the resources, goals and aspirations of the people involved. It supports rigorous social analysis and the engagement of stakeholders to define, design and implement advanced learning and action projects. SAS² is used in many different

fields in Canada and overseas: for strategic planning, social action research, monitoring and evaluation, project planning and conflict resolution. The Ginger Group Collaborative is an institutional partner of SAS² International, a body providing institutional support to the ongoing development of SAS². For more information visit <http://www.sas-pm.com/>

2) The **ACE-it** process. ACE-it is a tool that has been used in diverse settings as a framework for organizations and communities to probe topics and issues holistically. It creates opportunities to access and build on our different ways of knowing, perceptions, insights, experience and wisdom. Through its critically structured, flexible and emergent format, this inquiry-based process develops strong connections between leadership, systems thinking and honoring diversity to exhibit the value of collective and thinking through the lens of an integral model.



The ‘burning question’ that we posed to participants was: **What has you be on your edge as a facilitator?** Using a freelisting process [see appendix for details], three primary themes emerged from the group:

- ✓ Hidden agendas/lack of transparency
- ✓ Trust [and its shadow ‘fear’]
- ✓ Engaging the disengaged [including how to manage diverse styles and perspectives in groups].

We used these three themes as a foundation for the ACE-it process, which deepened the exploration and inquiry in these areas.

Following the inquiry, we debriefed the session. We recognized collectively that:

- We need to have confidence in own abilities as a facilitator in order to be fully present to listen for what needs to emerge from the group.
- Groups have an emergent nature that requires focus and discernment as a facilitator.
- We create spaces that allow people to truly listen to each other and learn the intricacies and meaning of each other’s music.
- In order for groups to let go, they need to feel confident and competent in their knowledge as well as the rest of the team.
- This process requires that people be able to engage in a particular kind of discourse [need to be critically self-reflective and possess ‘reflective judgement’]
- Not every individual or every group is self-aware and able to be self-reflective and present in the moment.
- The small group is a doorway to enter the whole system. The whole and the parts are interrelated.

We are deeply indebted to Lyn Hartley, a Ginger Group Collaborative affiliate, for her scholarly contribution to our work. Her paper, Collective Wisdom through Small Group Engagement, completed in January, 2007 as part of her Ph.D. program at Fielding has provided both a beacon and a mirror for the development of the Ginger Group’s critical development. The reference list accompanying this document is from that work.

For further exploration, contact Lyn directly at Lyn Hartley (lyn@northwestel.net)

Background – The Ginger Group Collaborative



The Ginger Group is a collaborative of practitioners from across Canada and Washington State. The group draws inspiration for its organizational structure and approach from its zesty namesake:

'Ginger is slang for spirit and "mettle"-to put mettle into. To "ginger up" is to rouse or enliven. Ginger root is a rhizome that has no fixed point and no fixed order. It is composed not of units, but of dimensions, or directions in motion. It has neither a beginning nor an end, but always a middle (milieu) from which it grows. A "ginger group" is a group within a movement or party that presses for stronger policy and action.'

The Ginger Group Collaborative is a nonprofit “community of practice”, within which is nested a social enterprise. In 2000, three independent organizational consultants (Smith, McLaren and Wright) started the group, as they were interested in learning together as well as exploring collaboration:

'We were intrigued by the special qualities and challenges of collaborative enterprises and relationships in all their complexity and variations. Through experience, we knew that good planning and visioning was necessary but not sufficient for partnerships to thrive and lead to great outcomes. As solo practitioners, we needed each other's support to dig deeper into the corners of these human systems, to take risks and move beyond our own comfort zones.'

The purpose of the group is threefold:

- *integrating practice with theory:*
In face-to-face "collaborative inquiries" we bring our own experience, knowledge and enthusiasm to bear upon current theories of organizational change and transformation.
- *applying new knowledge to real-life situations:*
We create new approaches, processes and tools for working in complex organizational systems, where working relationships are as important as results. Our approach is one of learning-in-action.
- *supporting collaborative leadership:*
We work with organizational and community leaders to strengthen collaborative skills and orientations, self-awareness, reflective practices, dialogue, conflict resolution.



For further information, consult the website: www.gingergroup.net

Appendices:

Freelisting [Social Analysis Systems, <http://www-sas-pm.com/>]

What is the goal of freelisting? *Freelisting* helps you create and organize the various elements contained within a situation or question, identifying those that are most important (using your own criteria), along with the ability to compare the results of different lists.



What are the guiding principles of freelisting?

- In any situation or question, *each person brings their own unique perspective* into it: what areas or domains are important, what elements are involved, and the relationships between elements and between domains. In short, people focus on what matters most to them, what seem most important in their world. Example: 13 people see an auto accident...how many versions are there of what really happened? The *truth* is often a composite of the various and differing points of view.
- *People have different views* of domains, elements, and the relationships between them. This may be the source of disagreement or misunderstanding between individuals or groups. Freelisting can reveal the underlying or less visible aspects that can so strongly influence problem-solving and decision-making processes.

Here is how to use Freelisting:

1. **Identify a topic, situation, 'burning question', or problem area** where you need to use Freelisting (such as current conflicts over natural resources in a certain place). Define the topic or situation as clearly as possible, and clarify the purpose of your exercise.
2. Give several 5x7 index cards (3-4, for instance) to each participant. Ask each participant to **write down one relevant element on each card** (such as conflicts between ranchers and farmers, between neighboring communities, between authorities and businesses, between men and women, etc.). Each participant can also record on each card the order in which the element appeared in his/her list. Also, **describe each element briefly on the reverse side of the card.**
3. Invite participants to **share their element cards, one at a time**, with all other participants. Often, when sharing their card, participants will give a short description of what they mean and how their element is relevant. **Group those cards that mean the same thing into piles**, and then give a name to **identify each pile**. Participants may discuss and form the piles at the same time they are presenting the cards.
4. After all cards have been shared, **identify topics/themes that might be missing** or cards that may be missing in each pile. When the group agrees, the missing topic(s) / elements can be written onto cards and placed accordingly.
5. **Sort piles by importance** – Piles with elements that people mention most often are usually the most important. Count the number of cards in each pile and write that number on topic card. **Arrange the piles into three concentric circles** (making each circle as large as you wish), placing the highest number piles in the middle and the remaining piles in descending rank outward to create the three levels of circles. The circles represent **(a) core elements**, those that obtain the highest ranks, **(b) intermediary elements**, those with middle-range ranks, and **(c) peripheral elements**, those with the lowest ranks. NOTE: Elements that people view as more important tend to appear sooner in their list, i.e., the #1 card that they each wrote...notice the distribution of #1 elements.

Making this process work for you:

- Use only one ranking criterion (such as the number of times the element is mentioned).
- During the exercise, discuss and record the views that participants express.



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ACE-it*

A source for fresh ideas

You can use **ACE –it** to get help from your peers or colleagues about any conundrum. Just take a few minutes to think about your situation and what burning questions you have. Then find a group of people you respect who are willing to give you 45 minutes to an hour of their time. You can do it over the phone or in person. Ask one person to be the timekeeper, and stick to the guidelines.

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| 5 minutes | Summary of your Situation and the 'burning' question you have | You briefly summarize what you think they need to know about the situation. End with 1-2 questions that you want their advice on. |
| 5 minutes | Clarification Questions | Your peers ask you questions to better understand the situation. You answer them. This is not the time for brainstorming or advice |
| 15 minutes | First Round—Peers Engage in Dialogue. You take Notes | Listen actively, jot down notes and no speaking, <i>however hard that may be.</i> |
| 5 minutes | You Delve Deeper | You probe, ask for more or additional information of particular interest, re-focus your question |
| 15 minutes | Second round—Peers have further dialogue, you take notes | Ditto! |
| 5 minutes | Debrief—what did you discover from this process? | You go first, peers follow... |

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