GROUNDWORK
AND THE NATURE OF ORGANISING

A PRACTICE GUIDE

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PHOTO CREDITS

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INTRODUCTION

Queen Margrethe II of Denmark is quoted as postulating, *"What if all the wars and conflict in the world are the result of conversations that never happened?"*

There is no doubt that most conflicts would be averted if the parties involved could enter into conversation with a mutual desire to listen, understand and acknowledge the needs of the other, and to collaborate in finding a mutually agreeable solution. Unfortunately, conflicts often arise from complex situations and contexts in which conversations are rarely simple, even when there is a mutual desire to engage.

What often allows us to successfully engage in conversation or collaboration, is having certain basic conditions in place. These conditions, and the practice of cultivating them, are the subject of this guide. We call the practice Groundwork.

THE NEED FOR COLLABORATION

Collaboration, or at least the idea of collaboration, is enjoying something of a renaissance these days. There is definitely some legitimacy to the comparison of collaboration to teenage sex: "Everyone is talking about it. Everyone thinks everyone else is doing it. Those who are doing it aren't doing it very well. Yet despite that, everyone talks about how good it feels."

In reality, collaborating is an art that requires commitment and practice. Collaboration, like sex, can never be a theoretical exercise. It is only by being in this practice that one begins to understand what it is involved. The practice of collaborating, working together as humans is also incredibly powerful and will always be much more than a popular concept.

Collaboration is essential for life. And as our understanding of this reality grows, so does our interest in what it takes to collaborate. At the same time, a tangible climate of fear and scarcity is manifesting in Western society as a push for separation. In response to this, many of us are asking ourselves: What are we collaborating for? Who are we prepared to collaborate with? What are we prepared to compromise on in order to achieve a common goal?

One thing is for sure. If we want to address the social, economic and environmental crises that are part of our reality today, we are long past the time for just thinking or talking about collaboration. We no longer have time to wait for others to make the first move. It is time to practice leadership by inviting each other together around what matters to us. The future of life as we know it will be determined by our ability to collaborate.

*"Collaboration is vital to sustain what we call
profound or really deep change, because without it,
organisations are just overwhelmed by the forces of the status quo."*
- Peter Senge

QUALITY OF COLLABORATION

Effective collaboration can be broadly measured according to whether or not you achieve that which you set out to achieve. For one reason or another, effective collaboration tends to be the exception, not the norm. There is no doubt that working with others brings challenges that don't exist when working alone: needing to accommodate worldviews or perspectives that differ from our own; working and learning styles that conflict with ours; an inability to hear or understand what others are really saying.

When it comes to collaborating around really complex challenges the problem is not a lack of technical expertise. Most of us simply don't have the organisational skills and capacities, the so-called "soft skills" required to co-create successful, long-term solutions. Fortunately, these capacities can be learned and developed through practice. The key point is that effective collaboration doesn't need to be difficult or painful. Indeed, it is entirely possible to co-create a collaborative process which not only fulfills the purpose, but which also becomes a generative and life-affirming experience where everyone involved benefits from the collaborative process itself. We call it **Powerful Collaboration**, and our goal is to create a culture where collaborating in this way is the norm.

THE NATURE OF ORGANISING

In conventional usage, an organisation refers to any group of two or more people bound by common purpose or undertaking shared work together. We often use the word organisation to refer to the organising entity, regardless of size, scope or function. For example, a school, a business, a government, a community, etc. When seen as a verb, however, the act of organising is the neverending process and function of creating something or achieving something. It is the verb, the action, the second of these two definitions that we are most interested in.

Powerful Collaboration requires that we organise ourselves well, as individuals, teams and organisations. When we consider the act of organising, we often assign it the qualities of being systematic, efficient, orderly, maybe even controlled. However, if we look at the original definition of the verb organise taken from its Latin root *organisare*,

"to arrange or form into a living being or organism", we must also acknowledge qualities that are more organic, adaptive, even chaotic in nature.

Nature has an inherent self-organising pattern that has allowed life to flourish and adapt to different conditions over millennia, without any external control. When we look closer at this pattern we see that it has elements of both chaos and order co-existing harmoniously. Dee Hock, founder of the VISA card, named this the chaordic space; the state from which creativity, newness and growth emerges. It is also a pattern which we can consciously work with in our organisations.

GROUNDWORK AND THE NATURE OF ORGANISING

We work from the assumption that human organisations are living systems, not mechanistic systems, even though we sometimes treat them as if they were. The people that make up our organisations are not only capable of self-organising, taking leadership and collaborating to create extraordinary results, but in the process, they are capable of growing to become the best and strongest possible version of themselves. These ideas are not new, but we are beginning to see them in a variety of new forms, e.g. Holacracy, Open Space Technology, Teal Organisations and other so-called self-management systems.

Biologists exploring how living systems evolve have identified a number of preconditions that influence whether self-organisation can emerge within a system. We will come back to these later, but the important thing to understand now is that these conditions can be consciously cultivated and influenced. This is the work that we're really interested in with Groundwork.

Groundwork is the practice of cultivating those conditions that enable powerful collaboration. Through practising Groundwork we can consciously create favourable conditions for self-organisation, and for other capacities we see as essential for collaborating powerfully, nurturing life, generating movement and innovating solutions in complex, adaptive systems like the ones we live and work in.

Naming this practice Groundwork connects it with the idea of organisations as living systems. It also draws inspiration from a quote by Otto Scharmer, who observes, "the quality of the field determines the quality of the yield". When we work with organisations, Groundwork is the ongoing practice of cultivating the conditions (or creating the necessary foundations) which give rise to powerful collaboration. The fruits of that collaboration will be a direct result of the organisational conditions that the collaborators themselves created.

GROUNDWORK AND THE ART OF HOSTING

Groundwork has emerged through the practice known as the Art of Hosting, widely acknowledged as an effective approach for working, collaborating, leading and learning in complex systems around issues that matter. The approach could be said to encompass three main components:

1. Hosting conversations and work with a focus on dialogue methodology and process design;
2. Harvesting the conversation/work, with a focus on learning, desired outcomes and strategy;
3. Organising around the conversation/work, with focus on creating enabling structures

If we liken these three components to juggling If we liken these three components to juggling balls that we aim to keep in constant motion as practitioners, Groundwork is the practice of creating a solid foundation for us to stand on as jugglers, and of cultivating the conditions that maximise our chances of juggling well. Ultimately these elements are all different aspects of one integrated practice. The Arts of Hosting, Harvesting and Organising are all key to practising good Groundwork, and Groundwork practice is integral to each of them in turn.

Given these links between Groundwork and the Art of Organising, it can be easy to confuse the two. Groundwork is about much more than getting really good at organising. It invites a focus on that which is less visible or that happens underground, below the surface. This includes the ongoing work of developing the self, the interior condition of each individual; it relates to the styles of leadership we practice, to the quality of interactions and relationships, to how we host and tend to the social field as a whole. Groundworking also relates to the clarifying of a shared vision, the ability to holding diverse perspectives together, and of continuously aligning individual and collective needs, long-term purpose and strategy.

By contrast, the Art of Organising is more practical, more tangible. It includes the operations, logistics, structures, systems, processes and so on that enable actions to be carried out which move the organisation closer to its goal. Together, the practical and organisational structures provide the basic foundations for collaboration. Just as the practices of hosting and harvesting are supported and strengthened by good organising, the practice of organising is underpinned by good Groundwork.

"Those who love peace must learn to organise as effectively as those who love war."
- Martin Luther King Jr.

By referring to Groundwork and the Art of Organising, we hope to bring consciousness to the importance of organising while offering a shared language for how Groundwork and the arts of organising, hosting and harvesting fit together. The Groundwork model (see page 6) offers a map which shows the multi-layered depth of this practice.

While there are already a number of valuable resources focusing on the arts of hosting, harvesting and organising/convening, this guide is the first to explore the practice of Groundwork.

ABOUT THIS GUIDE

The purpose of this Practice Guide is to identify and unfold the different elements of this practice through the Groundwork model, focusing on the six foundations of powerful collaboration.

For each foundation, we also offer of a set of principles, practices and concrete exercises. These can be seen as the building blocks from which powerful collaboration is built.

At the end of each section, we have also included specific tools and resources that can support teams and organisations in their efforts to strengthen these foundations and collaborate more powerfully.

When it comes to a target audience, the types of collaboration we see benefitting most from this practice are those that seek to become more participatory. We would be happy if this guide may serve other forms of collaboration too, whatever they might be. We believe that regardless of the purpose, content, scale or people involved, any time humans organise or collaborate, the foundations for success are the same. So let's take a look at them now.

THE GROUNDWORK MODEL

Fig 1, The Groundwork Model

THE 6 FOUNDATIONS OF POWERFUL COLLABORATION

The Groundwork model (Fig. 1) describes the foundations of powerful collaboration. In order of natural progression they are:

1. **Need and Purpose**

2. **Cultural**

3. **Strategic**

4. **Structural**

5. **Practical**

6. **Economic**

Each foundation is important. If one is weak or missing, the capacity for collaboration is severely limited.

Naming this practice Groundwork connects it with the idea of organisations as living systems. It also draws inspiration from a quote by Otto Scharmer, who observes "the quality of the field determines the quality of the yield".

When we work with organisations, Groundwork is the ongoing practice of cultivating the conditions (or creating the necessary foundations) which give rise to powerful collaboration. The fruits of that collaboration are a direct result of the organisational conditions that the collaborators themselves created.

WHERE AND HOW TO USE THE GROUNDWORK MODEL

This model can be applied to any process where collaboration or participation is required. It can be used in any of three ways:
1. As a generic map, offering a high-level overview of the elements at play in any collaborative endeavour.
2. As a planning canvas for individuals, teams, projects, start-ups and for organising meetings or events;
3. As an organisational development/management tool for tracking or reviewing progress in established teams/organisations.

THE RELATIONAL AND DIRECTIONAL PLANES

All foundations are needed. If one is weak or missing, the capacity for collaboration is compromised. The six foundations rest on two opposing planes; the Relational and the Directional Planes (see Fig 2). At the risk of being overly simplistic, these planes demonstrate that organisational activities are governed by two main drives; power and love. Power gives energy to those activities that focus direction and generate movement, and love to those that promote relationships and strengthen connections. These can be seen as the masculine and feminine energetic qualities that we all possess to a greater or lesser extent but it is important that they not be confused with gender roles.

In his book *Power and Love*, Adam Kahane describes these universal drives by drawing on definitions by theologian and philosopher Paul Tillich

"Tillich defines power as "the drive of everything living to realise itself, with increasing intensity and extensity" So power in this sense is the drive to achieve one's purpose, to get one's job done, to grow. He defines love as "the drive towards the unity of the separated."[1] So love in this sense is the drive to reconnect and make whole that which has become or appears fragmented."[2]

Power and love are often difficult to work with because each has a generative and degenerative side. Power without love can be However, love is what makes power generative instead of degenerative and power is what makes love generative instead of degenerative - the point being that these two drives are exactly complementary. Both are needed in order for each to fulfill its full potential. With this consciousness we can invite space for both these qualities or drives, and the people that hold them within the collaboration, to ensure that activities are carried in a balanced and generative way.

ABOVE AND BELOW GROUND

Another useful perspective offered by the Groundwork model has to do with manifestation.

When we talk about the field, we are primarily talking about the socio-cultural field, primarily associated with the Cultural and Strategic foundations. If we imagine that the horizontal line running through the middle of the model is the ground level, we see that these two foundations are underground. This makes sense because both culture (who we are and how we live and work together) and strategy (where we go and how we get there) are intangible by nature. You often need to be at the beating heart of the organisation to be able to sense or feel what is really going on there, let alone influence it. Therefore, a major part of Groundwork practice is about becoming more conscious of what we do and and how we do it when it comes to building strong Cultural and Strategic Foundations.

The Structural and Practical Foundations relate to activities which are more tangible in nature. These are the operational activities that most of us associate with organising well; working with systems and structures to take action and create impact. To a certain extent you don't have to be embedded inside the organisation to establish what is going on here.

[1]Paul Tillich, 1954, Love, Power and Justice: Ontological Analyses and Ethical Applications, Oxford University Press, New York (25, 36)
[2]Adam Kahane, 2010, Power and Love, Berrett-Koehler Publishers Inc., San Francisco (2)

Because the quality of the field determines the quality of the yield, the strength and clarity we create around relationships in the Cultural Foundation will align with our strength and clarity of Need/Purpose and manifest tangibly above ground as strength and clarity in the Structural Foundation. Similarly, the strength and clarity we create around direction in the Strategic Foundation will align with our strength and clarity of Need/Purpose and manifest tangibly above ground as strength and clarity in the Practical Foundation.

INSIDE AND OUT

The Need/Purpose Foundation provides the core clarity on why an organisation or collaboration is needed in the first place. The Economic Foundation makes visible what is and isn't possible given the resources available within the boundaries an organisational system. Between the clarity provided by these two foundations, the remaining foundations are held in place.

Fig 2, The Directional and Relational Planes

FURTHER RESOURCES ABOUT ORGANISATIONS

New Chaordic Stepping Stones, Chris Corrigan
The Inviting Organization, Michael Herman
Reinventing Organizations (summary), Frederic Laloux

NEED & PURPOSE FOUNDATION

"Collective clarity of Purpose is the invisible leader" - Mary Parker Follett

NEED

Context is all important. All organising has at its core an impulse to respond to a need. The need is the compelling and present reason for doing anything. Identifying the need helps to manifest purpose and anchor an invitation to collaborate. Sensing the need is the first step to designing any meeting, organisational structure or change initiative that is relevant. Needs can be identified in a number of ways through research, dialogue, large meetings, focus groups or individual sensing interviews.

PURPOSE

Dee Hock defines purpose as the highest collective aspiration of any group, *"if we could achieve that, my life, our lives and the lives of those we serve will be better"*. The purpose is "what ought to be." According to Hock, this is the hard part of any chaordic alliance; getting the purpose right, making it consistent with real need, with the laws of the planet, with the mysteries of life. Purpose is derived from morality, from vision, from collective wisdom, not from individual ambition or greed. That, says Hock, is where the whole industrial system, including both corporations and governments, has gotten so far off track.[3]

FOCUS

The Bigger Picture, Wider Context, Systems Perspective

CORE QUESTIONS

What is the need that wants to be addressed? What is the purpose (the future possibility) that we are working towards?

CORE PRACTICES

Practice Objectivity. It's a wonderful thing to find meaningful work and these days more and more of us are actively responding to a desire to be of service in the world. Confusion can arise when we identify what we see as an external need, but what is in reality our own need to be of service being projected on the world. Ask yourself, who does this work really serve? Why do I/we need this work, or who apart from me/us sees this need?

Practice Empathy. To really understand the needs of others it is important to be able to put yourself in their shoes and see what the world looks like from their perspective. Observe objectively the experiences of others, ask questions about what it is like to be in their position and what is important for them. Think about how you can listen from a place of openness and be aware of your own biases.

[3]http://donellameadows.org/archives/a-new-kind-of-organization-based-on-purpose-and-principle/

APPLICATION

Exercise 1 - Sense the field and the needs - Stakeholder mapping
One way to help define the need is to look at it through the eyes of your stakeholders, the users or clients. This often gives very valuable insights and important nuances.

Starting to map the stakeholder, people, organisations or groups of people who have a stake in what you are doing. The people who care or the people that influence the work you are doing. Take some time to think about criteria to help you select stakeholders.
Think outside the box: important stakeholders might not be directly related and working in a completely different field but have valuable ideas or experiences to contribute.

Mapping stakeholders can be done in different ways. It is easy to map them onto a structure of three or four concentric circles showing how close they are to the project. The circles can be: the core team, partners, participants/users/clients, advisory board or wisdom council and other relevant stakeholders. The stakeholders can also be mapped according to a coordinate system showing two axes with: Who has influence and who has interest in the issue. This gives interesting information to inform the strategic decisions about who needs to be involved in the process at what stage.

Exercise 2 - Crafting a Needs Statement
Sensing the need may at first be intuitive or very basic – like sensing hunger. But once the sensed need becomes conscious it can be acted upon and deepened, seeing it from different perspectives and understanding its subtleties.

The need is not complicated; it is real and clear; it speaks deeply and inspires invitation and action. Everything springs from this need. The way we hold it and invite others into it will inform the outcomes and of the results project or process.[4]

FURTHER RESOURCES

Introduction to Working with Needs - theneedswork.com
Dialog interviews, Reos Partners
Human Centered Design Toolkit, IDEO.org
Learning Journeys, Presencing Institute
Start with the "Why", Simon Sinek (Video)
Introduction to Design Thinking - (Video)
The Art of the Authentic Call - Phil Cass

[4]The Art of Harvesting 3.1, Nissen, Corrigan et al.

Harvest:

- A needs statement for the project, the team or the organisation
- A shared understanding about why it is important to do the work we do.
- A clear statement of urgency or timing with which helps us create a strong invitation invitation
- A Calling Question - a question that invites collective inquiry about how to address the need
- Clarity about the "call"
- Commitment to act

Exercise 3 - Crafting a Purpose Statement

Having explored the need, or the problem we want to be clear on what we are proposing to address this need. Here a purpose statement can be helpful. Create a purpose statement that is clear and offers compelling ideas about where we are going doing our best possible work. Discerning a shared purpose is helpful to guide work and seek outcomes, but don't get too attached. When we work in a chaordic space means constantly making adjustments as you learn and create new ideas and solutions. A purpose statement should offer a direction of where we are going, but not necessarily a destination.

"An effective statement of purpose will be a clear, commonly understood statement that identifies and binds the community together as worthy of pursuit. When properly done, it can usually be expressed in a single sentence. Participants will say about the purpose, "If we could achieve that, my life would have meaning."
— Dee Hock

Once you have a purpose statement, revisit it regularly to make sure it is valid and true. Adjust it if necessary, based on what you're learning as you go.

- If this work should live up to its fullest potential, what do you imagine is possible?
- What could this work do/create/inspire/result in?
- Where should we be heading?
- What are the stories we want more of?

Harvest:

- A common understanding of the basic direction for the work
- Commitment and buy-in to a direction and intention for the work
- A clear statement of purpose around which to build an invitation or communication strategy.[5]

CULTURAL FOUNDATION

"Just as every good farmer focuses all his attention on sustaining and enhancing the quality of the soil, every good organisational leader focuses all her attention on sustaining and enhancing the quality of the social field that she is responsible for." - Otto Scharmer

Most of us are probably familiar with the traditional concept of 'team-building' to foster team culture and relationships. This focuses on the obvious relationships between individuals within a team/organisation, but tends to neglect 'external' relationships with people beyond the traditional organisational boundaries. These relationships are just as important for the health of the social system within which the organisation operates. A strong cultural foundation is dependent on its individual members maintaining healthy relationships with themselves. Each of us, as individuals, has work to do with ourselves in order that we can contribute our best to the collaboration. This work looks different for each of us but it can involve deep inner work, dealing with unwanted 'baggage', learning about oneself and how we show up in relationship to others. By developing healthy a relationship to oneself, we are more likely to contribute to a culture of self-awareness in which egos are less likely to get in the way of the work that needs doing.

If it is indeed true that *"the quality of the field determines the quality of the yield"*, then the quality of a collaboration depends on the quality (the health, strength and diversity) of the relationships and the cultural practices within it. Our focus must shift to creating those conditions that invite strength and diversity, and allow everyone within the team to perform at their best. Once this happens then the qualities of collective intelligence and self-organisation emerge more readily. It stands to reason that the Cultural foundation is the primary foundation of any successful collaboration.

With a strong cultural foundation, the team itself becomes a living entity rather than simply a collection of individuals. Appropriately, the archaic definition of the verb 'to organise' means *"to arrange or form into a living being or tissue"*.

FOCUS

The Social Field and the conditions within it. While the boundaries of the field can be difficult to define, they can be said to contain the team/organisation and stakeholders which whom there is personal contact. The field is sometimes called the socio-cultural system

CORE QUESTION

Who are we and how are we working/being together?

CORE PRINCIPLES

1. **Never Work Alone.** If you think the issue you are working on is important to others, then it's important that you invite others to be part of the process in some way, shape or form. As the saying goes, it takes two to tango and it takes at least two to collaborate.

2. **People Support What They Create.**
The only way to create ownership is to involve people in creating the project. This does not mean that everyone has to be involved in every aspect of the project but it does mean that everyone has to touch into it. People don't always do what you tell them they are to do but what they feel engaged with. Involve them in the aspect of the creation of the work; give them a voice.

3. **People Act Responsibly When They Care.**
You don't get accountability by bringing in more measures, punishments, more fear; you get it by creating care. We create care by caring. Caring whether this person, this work, this client gets well served by our organisation. It's always worth asking the question: Are we working on an issue that people truly care about?

4. **Who we are together is always different and more than who we are alone.** Our range of possibilities increases as we join with others. New relationships create new capacities and sharing ideas allows for collective wisdom to emerge.

5. **Nature seeks diversity.** New relationships open up to new possibilities; diversity of perspectives and creative expression increases our chances of survival. Invite different points of view, know that conflicts will arise and that they will help you grow and learn.

CORE PRACTICES

Self Awareness. Know yourself and what you need to be fully present. Know your boundaries and the edges of your comfort zone. Know your strengths and what you have to offer. Know your weaknesses and limitations. Know your preferred working styles and learning styles. This self-awareness is invaluable when in challenging situations or when navigating complex group dynamics. And go easy on yourself - this is the practice of a lifetime!

Practice Dialogue. Dialogue is an individual and collective practice which focuses on listening to build bridges and create common understanding. It deepens relationships while helping people embrace differences and resolve misunderstanding, conflicts and tension.

Focus on what matters. A living system pays attention only to that which is meaningful to it here and how.[6] It follows that those things that matter (your conversations and work) deserve to be well-hosted as process and content go together hand-in-hand. Try to see the collaboration as a dynamic process within a complex adaptive system with emergent properties. Too often we tend to focus on the parts rather than seeing the whole. A better appreciation of the nature of systems leads to wiser, more appropriate decisions and actions.

[6]Margaret J Wheatley, 1993, Leadership and the New Science, Berrett-Koehler

Define shared principles and practices for collaboration. Every group of people will hold a unique set of values and principles and it's important to make these visible. The best principles help to guide us when everything else breaks down, so make them observable and simple to remember.

Create clear agreements. Be sure to take time to bring clarity around roles, expectations and agreements around how you will work together. Write everything down and be clear about how these agreements can be adjust or update. Having a social contract which creates a solid common ground makes it easier to deal with other aspects of the collaboration that might be less clear.

Explore your limiting beliefs. Make time to uncover what belief systems are present in the team, surfacing fears, anxieties, shadows and limiting beliefs before inadvertently building them into plans and processes.

Share stories. Inviting each other to share personal stories and experiences creates a depth of connection and understanding of who we are together as a team of individuals. It helps us to see the unique qualities of different team members and to integrate diverse perspectives, allowing individuals to feel valued and respected. Making people aware of their own strengths results in better

communication and trust among team members, and consequently higher levels of performance.

Asking for help is a practice of leadership and kindness. Someone who cannot ask for help cannot be trusted.[7]

HOST YOURSELF AND OTHERS

Theoretical biologist Stuart Kauffman describes five essential preconditions for life to emerge from primordial chaos. These same preconditions could be applied to self-organisation in complex adaptive systems. The first of these is "a nutrient-rich, relatively protected environment". If it's too safe or protected, this violates the fifth precondition, which is that the system must sit at the edge of chaos - an idea that aligns well with Dee Hock's chaordic principle. The other three preconditions are: a high level of diversity and potential complexity in terms of the elements present; a drive for improvement; and sparse, pre-existing connections between the various elements.[8]

Consciously hosting people and spaces is allows us to create physical and energetic conditions for a group to be fully present and productive. It is an art to become skillful at helping ourselves and others to work well together. We talk about hosting, because it invites attention and care to all aspects of people's work together. The intention is to host each other's wellbeing and development as well as their productivity, just as any person welcoming guests will make sure they have everything they need to make their visit fruitful.

Hosting is an individual and collective leadership practice that should infuse every aspect and every foundation of the collaboration, not just the Cultural foundation. By practising together, a team can develop a culture of Hosting and Participatory Leadership, exemplified by The Fourfold Practice (See more here):

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[7]This principle comes from the Nu-chal-nuth people in British Columbia who were traditionally whalers and understood that no one can bring in a whale alone. If you do, you endanger both yourself and your family, even the fabric of the village. They say "It is kind to ask for help. The one who cannot ask for help cannot be trusted."
[8]Harrison Owen, 2000, The Power of Spirit: How Organisations Transform, Berret Koelher, p42

1. **Host yourself** so that you can be fully present, bringing your whole self to the conversation and the work. This is the realm of personal practice.
2. Participate fully and allow yourself to **Be Hosted**. Be curious, listen to understand, become a learner and a whole-hearted participant. Support others to contribute.
3. Invite others, **Host Others**, take leadership and responsibility when you see something is needed, become a community of learners.
4. Host each other and **Co-create** together; co-create values, principles and practices; agendas, visions, priorities and decisions. Becoming a community of practice opens the door to becoming a community that learns. If we wish to build community through our work then we must practice community in the design and delivery of that work.

THE ART OF INVITATION

In our work, developing invitations to meetings, events or projects is becoming more and more of an art. When we host the call of inspiration, we do well to pay attention to how it generates the urge to invite others. The goal of invitation is to attract people fully to whatever it is that you're doing. When we think of invitation, the first thing that usually comes to mind is simply a notice sent out by email or appearing on a bulletin board. Invitation as a THING. Over the years we have come to realise that invitation is a lifestyle and a practice. As a design principle, it pays to remember that invitation is a process that begins long before the formal invitation is issued. It is more of a stance in life than a document or website.

Three important principles govern the practice of invitation.

1. **Who we are and how we show up in the world is the biggest invitation there is.**

2. **How we invite other will determine how they show up.**

3. **We tend to trust invitations from people who are like us - a core team needs to be reflective of the people we are seeking to engage.**

In self-organising systems, invitation is a leadership practice and a process that brings us alive. When you compare it to compulsion, invitation results in people choosing to show up and being open, curious and enthusiastic. Compulsion results in closed, defensive, judgmental and apathetic participation.[9]

APPLICATION

Exercise 1 - Clarifying the call
An important part of any team culture is clarity around individual purpose or motivation. This is about looking at the need and purpose and seeing why this matters to me and to each person on the team. When there is shared clarity about how the whole team connects to the need we can feel alignment to something bigger than each of us and at the same time understand that we might be holding different parts of the call and the purpose.

A call starts from a place of disturbance, a longing for something to be different - it can be your own or someone else's. Noticing the disturbance is the turning point. The nature of the call may not be clear in the beginning. It takes time to hear it clearly. Clarity often comes through courage to be curious, to be in dialogue and ask for help in clarifying the disturbance you feel.

[9]Based on "Lessons about invitation" by Chris Corrigan
[10]Lotte Darsø, 2001, Innovation in the Making, Copenhagen Business School Press, Copenhagen.
[11]Inspired by the first three steps of the Team Performance Model, Sibbet and Drexler

Authentic calls are not ego calls, it is not my call but everyone's call. The call is not a project. It is a commitment to the disturbance you feel.

Once the call has been made, you're no longer in control and have to let go because now it's shared and has a life of its own.

Notice who named the call, how the conversation has evolved, who have been invited to this conversation and who else might need to be invited.

Exercise 2 - Preject: Clarifying expectations and building trust

When we start a new collaboration it is important to align and build relationships between team members, clarify expectations, roles and responsibilities, and building a culture of trust and collaboration. According to Danish researcher and lecturer on innovation, Lotte Darsø, the preject is chaotic phase of being in the not knowing, aligning the team etc, before the project starts.[10] It's important to take this time to explore and to understand the potential of our work together before converging on a course and committing to it. One of the biggest reasons for failure in projects is the lack of clarity around expectations and deliverables.

The project aims to explore openly and transparently the potential in a project. It generates a group that is aligned and committed, with shared ownership of the project. It also allows for clarification around roles and competencies and questions around how the group will be resourced.

There are various potential focus points for the project. The following areas are important to cover to create a shared understanding of the project and beginning trust.[11]

WHY: Why are we doing what we are doing? Connecting back to the need and purpose.

WHO: Who are we? Understand the different members of the team, their strengths, weaknesses, fears, dreams and secrets. How do they behave under stress, and just as importantly, how do they act in non-work situations. Change contexts and experience how different people thrive in different contexts. What are our limiting beliefs? Explore what each team member would like to learn and develop and what they need help with. What is the time availability or time constraints of each member.

WHAT: What are we trying to achieve, what are our goals, what is the landscape/context we are operating in? What are the trends, tendencies, opportunities and challenges? How are we working together? What resources do we have available? Success criteria, timeline and roles. What is the commitment of each team member. How would we like to work together?

FURTHER RESOURCES

The Cultural Foundation - Video interview by Toke Møller (5')
The Cultural Foundation - Teaching video by Toke Møller (38')
Organisational Culture and Leadership - Edgar Schein
IDOART - simple and effective meeting planning tool
The Blueprint of We - An introduction to a template for creating a social contract between team members
Working with Limiting Beliefs - Caitlin Frost (based on The Work by Byron Katie)
The Team Performance Model, David Sibbet (Video)

MORE TOOLS, METHODS AND PRACTICES FOR STRENGTHENING THE CULTURAL FOUNDATION

Check In and Check Out
8 Visual Check-Ins to Invite Creative Presence - Paul Messer
Library of Facilitation Resources - SessionLab
Working with Mental Models and Worldview Intelligence, Jerry Nagel
The Parking Lot
Giving and Receiving Effective Feedback

STRATEGIC FOUNDATION

"It is not the strongest that survive, nor the most intelligent, but the ones most responsive to change." - Charles Darwin

CORE PRINCIPLES

1. **Prepare to be surprised.** Nature, and all of nature, including ourselves, is in constant change (without change management).

2. **A living system cannot be steered or controlled.** It can only be teased, nudged, titillated to see thing differently.

3. **What gets measured, gets managed.** What we give our attention to, grows.

4. **Work with principles or criteria for success rather than planning for specific scenarios.** Success is often defined by movement in a particular direction, not arrival at a fixed destination.

CORE PRACTICES

Stay connected to The Call. It is an ongoing practice to revisit from time-to-time the need you seek to address, the purpose you seek to fulfill and the desired outcomes of you seek to achieve with your collaboration. Real clarity of need, purpose and desired outcomes can be crafted into a Calling Question which attracts energy and serves as an invitation for others to be curious.

Develop a Vision and Strategy and communicate them. Everyone involved in your collaboration should understand exactly what it is you are working towards. Collective clarity of Purpose is the invisible leader.

Backcasting is a practice which involves working backwards from a vision of success using the dynamic tension between where you are and where you want to go. It is impossible to be strategic unless you know what you are aiming for.

The Strategic Foundation provides the focus and direction for our shared work. Its function is to make visible and engage the dynamic tension between need, purpose and vision. Translating and communicating this into an overall direction creates clarity around which the individual, team and organisation can align. A strong Strategic Foundation enables us navigate complexity, and be clear when prioritising or making decisions around what is important to the organisation and the work. Vision, Systems Thinking, Creativity, Curiosity, Flexibility, and the ability to work with emergence are qualities that offer strength to this foundation

FOCUS

Project Goals, Desired Outcomes, Prioritisation and Strategy.

CORE QUESTION

Where are we going and how will we get there?

STRATEGIC HARVESTING

You're not planning a meeting or a project, you're planning a Harvest. This practice involves first identifying the outcomes that you want to 'harvest' from a meeting, event or project (ideas, learning, decisions, etc). Once you have this clarity, identify the questions that point to these outcomes and design your conversation or process to find answers to them. Harvest the essence of these processes and work with the group to make sense and meaning from it. Feed results forward to whoever can use them to inform wiser action and generate movement towards the intended goal.

APPLICATION

Exercise 1 - STAKEHOLDERS: Stakeholder Analysis
Building on the initial stakeholder map that you did when you were clarifying the need and purpose - here we can dive a little deeper and look at how we want to include the different needs and perspectives of the stakeholders, when we are defining the desired outcomes and results of our project, conversation or initiative.

Revisit your stakeholder needs map with the concentric circles. In the centre of diagram goes your purpose statement. Place the names of your team in the first circle. This is the core team of people most fully committed to and responsible for the project.[12] Mapping the network helps us to see who is in this work with us and who will have an interest in what we are doing.

Your core-team:
Of the people in your network, who really resonated with you, who understood your question and were similarly passionate about it? And, equally important, who would be able to support you in organising, hosting and sustaining your project?

Your supporters and strategic partners:
Of the stakeholders and people in your network, who has offered some form of support. Think of the ways you can enlist their support and make them feel valued in your project. What information, results or harvest do these partners need to stay engaged? What is the exchange you are proposing with these supporters and partners?

Your clients/users/participants:
What did you learn about the potential participants/ clients for your project? What questions are alive for them? What themes and languages speak to them? How many potential participants/clients or beneficiaries are there? What are the place, time and resource restrictions that will impact your project?

Who is missing?
What crucial partners, team-members or participant-groups are still missing? Who are the under-represented voices? Are there alternative ways of engaging or involving them? Are there other stakeholders in your network who can take their role or speak for them?

FURTHER RESOURCES

Theory of Change, NESTA
A Brief History of the Future, Marco Valente
Backcasting from Principles, The Natural Step
Designing for Wiser Action, Toke Møller
Mapping Stakeholders and Analysis, NESTA
The Art of Harvesting 3.1, Nissen, Corrigan et al.
The Chaordic Stepping Stones of Harvesting Nissen, Kleinschmager et al.

[12] The New Chaordic Stepping Stones - Chris Corrigan

Looking at these initial stakeholders, what is it they need to stay engaged? This question connects to your value proposition and to how you are harvesting what you do and communicate your message. It is very important to be aware of your different stakeholders and be clear on how you connect and communicate with them. It will be very different what motivated the different stakeholders and what information is relevant for them. See more on this topic under "Creating a Strategic Harvesting Plan" on pageXXX.

Exercise 2: Create a shared vision - Where do we want to go?

Collective Visioning is the act or power of seeing together.

A vision statement is sometimes called a picture of your organisation in the future but it's so much more than that. Your vision statement is your inspiration, the framework for all your strategic planning. What reality are you creating? It is the dream you are making real.

A vision statement may apply to an entire company or to a single division of the Company or be useful for a team or project.

What you are doing when creating a vision statement is articulating your dreams and hopes for your business. It reminds you of what you are trying to build. It give the direction or the North that helps you navigate and prioritize your actions.

One of the simplest visioning tools is to invite people to close their eyes and imagine themselves walking down the street in 2030 and stopping to look around. Ask them what they can see and hear. Invite them to record their impressions through drawing, painting, writing poetry or writing stories. This can also be adapted to imagining picking up a newspaper or magazine in 3, 5 or 10 years from now and reading the cover story, explaining what you have achieved with your project. For more info on the cover story and the cover story template have a look here.

The first thing to consider about visioning is that context is critical. A completely open-ended visioning process is of little value: what matters is that the vision has roots in a future where the need you are addressing have been addressed.[13]

> *"It is not what the vision is;*
> *it is what it does that is important."*
> — Peter Senge

Exercise 3 - Create a strategic harvesting plan

What impact and learning are you trying to create with your project or organisation? Creating a strategic harvesting plan, helps us become clear about what our desired outcomes are and how we can sow the seeds that we need to be able to harvest the results we need. This is particularly relevant for participatory processes where we are engaging a variety of stakeholders, but can also be adapted to a more traditional project focusing on internal documentation, learning and external communication.

Very often we are creating value for many different target groups or stakeholders and it is useful to revisit our stakeholder map and identify who we are addressing with our harvest and what they will with the harvest we are sharing. Are we aiming to inform, inspire or give input to important strategic decisions.

BEING STRATEGIC

Think strategically with the mandate-givers and your team. Identify the deliverables (tangible, intangible) and help people verbalize them. Very often a major part of the value created is intangible and not recognized or mentioned because it is harder to see and measure.

It is very important that harvesting, sense-making and learning does not become an afterthought, but be embedded how the project or engagement process works.

[13] https://transitionnetwork.org/ingredients/starting/visioning#full-description

What are the questions we want to plant as the seeds of the harvest? What kind of information or answers are we looking for? Once you have this clarity with your team and mandate-givers, design the process to allow you to reach these deliverables.

When designing the harvest strategy it is useful to think about a matrix of individual/collective harvests and tangible/intangible harvests so that we can design to accommodate these different levels.

The intangible-collective output is what is known as Social Capital; the passion, trust, commitment and connectedness of relationship that really makes things happen. This is an outcome that is often not taken consciously into consideration when designing

process. Mindsets shift and transformation learning takes place on both an individual and collective level when we begin to see and make tangible that which was previously intangible. See what you can do to design for this kind of outcome.

For any of this harvest to be useful it needs to be connected to the Need and Purpose and it needs to be clear how the information gathered will be used afterwards to move to move us towards our vision.

The template below[14] can help us structure your "Strategic harvesting plan"
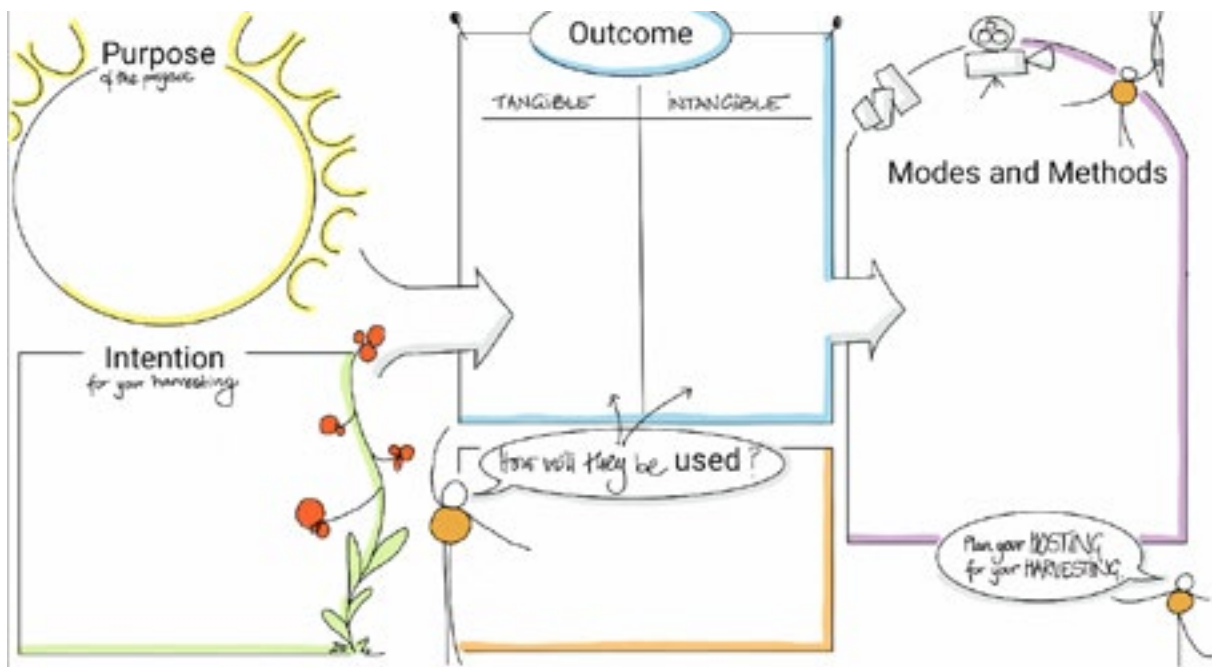
CC - Developed by Viola Tshendel for Beehive Productions inspired by Chris Corrigan "New Chaordic Stepping Stones" 2016

STRUCTURAL FOUNDATION

"Self-organising is not a startling new feature of the world, it is the way the world has created itself for billions of years. In all of human activity, self-organisation is how we begin. It is what we do until we interfere with the process and try to control one another"
- Meg Wheatley and Myron Kellner-Rogers

Structure is important on many levels for the success of any team or organisation. Helpful structures are those that create flexibility, spaciousness and flow. Unhelpful structures limit freedom, flexibility and flow. Clarity of Need and Purpose is required to determine what structures can be considered helpful. Bear in mind that needs and contexts change so flexibility and adaptability are real strengths in this foundation.

FOCUS

The structure of the team, organisation and stakeholders (in as broad terms as possible); roles, relationships, skills and capacities.

CORE QUESTION

What structures are needed and how will we organise ourselves within them?

CORE PRINCIPLES

1. **Seek simplicity.** There is no need to over-engineer things; find the minimal, optimal structure for creating good flow and getting things done.

2. **Build Capacity to build capacity.** Continually build organisational capacity to avoid indispensability or over-reliance on any single part of the system.

3. **We humans are capable of self-organising given the right conditions.** self-organisation shifts to a higher order.

4. **Structures can set you free.** Don't be afraid of structure. Putting the right supporting structures/infrastructures in place creates freedom and energy to focus on other things.

5. **Be over-prepared and under-structured.** Be flexible and adapt to the changing context or conditions you work in, but do not let the need for flexibility be an excuse for not being well prepared. Imagine different scenarios and have a plan A, B and C.

The Structural foundation relates to necessary functions and structures. It's importance lies in the ability to provide strength and capacity to sustain the collaboration and our ability to take action over time. This is where we see the different parts of the system, how they function and influence each other. Consideration should extend beyond an organisation's conventional boundaries to include shareholders where applicable, for example, customers, board members, family members, neighbours, the physical environment etc. By acknowledging these larger system boundaries, we very quickly see how complexity enters our work.

Some examples of common structures include:

- Business plans
- Legal structure
- Organisational pattern/structure (team structures, roles, responsibilities)
- Process structures (systems and processes including how meetings and time are hosted)
- Communication infrastructure
- Physical and energetic space

CORE PRACTICES

Establish a Rhythm and Practice for Meeting well. Creating flexible routines and structures around when and how you meet, allows a positive meeting culture to develop. Connecting regularly builds momentum and allows a team to stay connected and well informed about what is happening for each team member both on a personal and professional level. The frequency with which a team meets, depends on the need, purpose, timing and nature of the collaboration, but work towards a minimum monthly **meeting of the whole core team**, and ongoing meetings of the different work groups as appropriate to their deliverables.

Hosted Meetings. A good meeting should be prepared and hosted well and it is good practice to share the hosting role around. The purpose of the meeting should be clear and everyone should be given an opportunity to check in. The agenda should only contain items that are relevant for everyone present, otherwise a separate smaller meeting will suffice. Be conscious about what information needs to be shared, what requires co-creation and what decisions needs to be made. Important decisions, questions, clarity, responsibilities and next steps should be harvested in a way that can easily be shared with all who need the information, either to act on or to simply stay informed.

Create a comfortable physical space that allows for good work and fill it with the necessary equipment and resources.

Develop an organisational structure. Identify, create and employ those structures, patterns and forms that provide flexibility, adaptability and efficacy. This doesn't mean you need to define a management structure, rather define principle for how you will working together, identify roles and functions, then sign up to responsibilities. Essential roles for any meeting: Host, Harvester and Timekeeper.

Agree on good procedures. establish a good rhythm around meetings; establish procedures around communicating decision, ideas, learning, knowledge management and information sharing.

Build capacity. This relates to developing both 'hard' skills and resources but also for working together in diverse and often conflictual relationships. This is about learning from each other and gathering perspectives from the wider system that we work in. We must practice with each other if we hope to engage the diverse external perspectives meaningfully and accurately. Never stop learning; practice apprenticeship on all levels.

Communicate Well. Information is the currency through which value is created in an organisation. Agree on systems and procedures for managing and sharing knowledge/information. Establish a physical and/or online hub of information and resources and ensure collaborators know how to access information they need.

APPLICATION

Exercise 1 CORE TEAM: Creating and Sustaining Effective Core-Teams[15]

Successful collaboration involves many elements; direction and relationship, content and process, leadership and learning. Core teams are created to allow us to move through these various contexts using organising forms that are suitable - hierarchy to get things done, circle for reflection, network to share information / knowledge, bureaucracy to bring stability. Each of these forms is actually an organisational paradigm. Teams need to build the capacity to work flexibly in all of these "paradigms" and understand the usefulness of each (see The 5th Organisational Paradigm). When functioning well, core teams serve as the container within which the complexity of these elements can be held well. This container is essential for sustaining the team itself, but is also often responsible for building, hosting and maintaining the wider field. We often say it takes a field to host a field.

A core team should be diverse enough to include a variety of skills and perspectives, yet small enough to remain agile and responsive. Diverse groups of people are wiser, smarter and more effective than small homogenous groups (as long as there is good process in place for people to work together).

Based on clarity of need, purpose and desired outcomes it is helpful to look at what team is in place. Who have resonated with the call and the purpose statement and what qualities, roles and profiles are needed on a core team? Here are some roles and perspectives that are helpful to consider as we are creating the team:

The Caller (or Callers) - At the beginning of a collaborative process, the caller is the client of the process, founder of the project; the one who has identified the need and who holds the highest stake in what will come out of it. The caller can play a more or less active role in the team, but is the one who tends to the center - connecting and aligning with the original need and purpose.

The Logistics Person - The logistics person attends to the practical details of materials, registrations, communications and all of the administrative requirements to make an initiative successful.

The Strategic Perspective - The people holding the strategic perspective are those who understand the need for the initiative; those who are connected to the power and resources to make it happen and give the best chance of success; those who have clarity around the results or impact you are trying to create; those responsible for ensuring that the actions and process is moving towards the vision and aligned with the purpose.

Process Host - The Process Host advises on the design of conversations, introduces the processes, their purpose and explains how people can engage and participate. They host meetings, and tend to the wellbeing of the team.

Harvester - Harvesters capture, document and synthesise the key insights from whatever the group is engaging with to make it relevant. Different tools can be used to make learning, decisions or clarity visible and usable. Once this data/information is captured, the group (or representatives of the group) can then make sense of it by deciding what is useful and relevant for feeding forward. It is important to note that it should not the left to the harvester alone to decide what is meaningful to the group.

Space and Beauty - The Space Host looks after both the physical and aesthetic aspects of the work space and holds the objective of creating hospitable conditions for working together. Space is more than a physical container for work, it is also an energetic container. Tending to the space brings more life and energy to the space and therefore into the work.

Whether the collaborative process is large or small, this basic architecture can serve to hold all of the pieces of an initiative. In small meetings multiple roles or functions may be played by one person. In large initiatives over time, each of these functions can be taken by a team of multiple people.

[15]Adapted from a paper on core teams by Tim Merry

Exercise 2 - PLACE AND SPACE

In whatever work we do, the geographic location and physical arrangement of the workspace have a significant influence on the quality of the work. Meetings and conversations can be optimized by looking at how the space can serve the purpose and the specifics of the work to be done. Workspace needs will obviously be different from context to context, e.g. organising a large participatory process, designing our office for visual communication or creating a co-working space for social entrepreneurs.

Some considerations for thinking about space and venue are:
- What does the venue have to offer and contribute to the conversation or collaboration you are planning for?
- Does the space you have selected have natural light? Is it surrounded by or does it incorporate nature?
- Does it have historical significance?
- What other activities are happening or have happened in the space that might have an effect on the energetic quality of the space?
- Is it a blank canvas that provides you and your team the opportunity to create the quality you are looking for from scratch or does it have restrictions? For example, make sure to ask about hanging paper/posters on the walls if that is something you plan to do.
- Food, snacks, coffee, fruit also stimulates collaboration and creativity.

SPACE AND BEAUTY - AESTHETICS

When we talk about space we can not leave out talking about aesthetics and beauty. While this is often subjective, it is important to be aware of interior design, working with decoration, artwork, plants, surfaces, flowers, details that can create a special atmosphere.

People feel cared for when special attention is given to the space and the working environment they are in. This affects the group's general wellbeing and motivation.
Bringing nature into the space, creates life and stimulates creativity. Taking your work out into nature (when it's practical) can bring in surprisingly different dynamics.

For more inspiration on creating spaces:
Creating Collaborative Spaces that Work, Knoll Workspace Research

Exercise 3 - RHYTHM & FLOW: Establish a Rhythm and Practice for Meeting Well

For any team it is key to establish a good rhythm and a cadence that keeps the work of the team moving forward at a pace that you can maintain over time. It is helpful to define regular meetings, whether it is a weekly team meeting a monthly board meeting or a daily check in. The rhythm is dependant on many factors, like where the team members are located, what stage the project is at and what kind of collaboration is needed. It can be helpful to think of different rhythms for engaging different groups of stakeholders - the core team obviously have a different need and therefore rhythm for meeting with each other than with partners or clients or participants.

Here are some suggestions that can help a meeting flow better. See also IDOART listed below.

- **Appoint a Host** to prepare and hold the agenda and a Harvester to document what emerges
- **Frame the meeting;** articulate the purpose, intention and invitation
- **'Check In'** to allow everyone to become present to what is at hand
- **Co-create** shared agreements, principles and practices, and stick to them
- **Use a Talking Piece** if it is helpful and the context is suitable
- **Choose a powerful question**
- **Harvest clarity** as it emerges and create a record that can be shared with others and serve as a reference for later.
- **Create a timeline** with the goal, sub goals, milestones and meeting points for the group.

FURTHER RESOURCES

Five Organising Paradigms - Excerpt from the Art of Hosting workbook
Capacity Building and Apprenticeship - Mary Alice Arthur et al.
Liberating Structures - Lipmanowicz and McCandless
Introduction to Holacracy
Sociocracy Handbook, Bernhard Bockelbrink and James Priest
Dynamic Governance and Sociocracy for Business, Video
Agile Project Management Handbook, Emerson Taymor
Lean startup book summary, Eric Ries
Principles of a Chaordic Organisation, Dee Hock's
The Power of Place - Living Wholeness Institute
Core Teams, Tim Merry (Video)

FURTHER RESOURCES AND TIPS FOR SUPPORTING GOOD MEETING PRACTICE

Check in and Check out
Parking lot
IDOART
Graphic Gameplan
Visual Meetings, David Sibbet

PRACTICAL FOUNDATION

"Ideas without action or inspiration without work are meaningless. Both are needed together." - Jos Schuylenburg

The Practical Foundation is about implementation and execution. It is where strategic decisions, priorities and intentions are translated into practical actions to create movement and results. At the same time, action is an integral part of maintaining and strengthening the other foundations. Many factors influence the type of actions needed at a given point in time, however wise actions have a better chance of manifesting when:

1. a team holds an awareness of the big picture and the external context.
2. a team is connected to their individual shared purpose.
3. a team is capable of communicating its own strategic clarity, and
4. structures, systems and internal capacity exists to implement them

FOCUS

Action, Implementation, Evaluation/Reflection and Feeding Learning Forward

CORE QUESTION

What actions are we taking and how will we integrate learning to improve both execution and impact over time?

CORE PRINCIPLES

1. **Focus on What Works.** Nature is not intent on finding perfect solutions, only workable solutions

2. **Does it grow corn for the people?** Wise action always arises from a desire to serve the common good of all people.

3. **All the answers do not exist 'out there'.** We must sometimes experiment to find out what works.

4. **Flexibility and continuous learning.** What are we learning and how should we adjust our actions accordingly?

CORE PRACTICE

Sense what type of action is needed. Sometimes the wisest action is to do nothing. It is important to understand the difference between an intervention, consultation, engagement and a genuine Invitation, and to know when each is applicable.

Choose your timing well. Is this the right time for this action? Is this the right action for this time?

Project Leadership and Management. Good collaboration often requires both good leadership and management. Know what your team, project and context requires and see that it happens.

Make good use of probes, prototypes, pilots and programs. The learning gained from mistakes and failures can often be more useful than learning from success. Seek to fail when it is safe to do so. It is better to fail and learn from failure when the stakes are small than to fail when the stakes are high.[16]

Create space to reflect on what you are learning, document and share it. Be in a constant iterative loop of action, reflection and learning.

APPLICATION

Exercise 1 - Online Project Management software

Organising tasks, deadlines, milestones and team communication can be a challenge, especially when we are working in bigger teams or from different locations. There are many tools and methods that can help us organise ourselves online. The most important step in effective online organising is to find a tool that aligns with the experience of the team and that works well with whatever technology you are using. Having chosen a tool, the key to success is consistency; commit to using it and move all related communication to that platform. The tool can be as simple as a google doc or you can choose something more specific for your need. Here are a few examples of free, online project management platforms that we have found useful:

- Podio, allows you to customise your workspace and add-ons
- Asana: Simple and easy to use, does not have many extra features but enough to be very helpful for organising communication around tasks, setting deadlines, milestones and assigning tasks.
- Slack, A great platform for keeping track of communication within your team. It is not geared towards managing tasks, but to managing various communications threads,
- Trello, As Asana, a simple and powerful project management tool. Trello is built on the idea of managing task lists and allows you to move a task from one list to another. Works very well for Scrum and Kanban project management.
- Hightail - Allows you to invite feedback on PDFs, video and graphics from a group of collaborators.
- Loomio - A suite of collaborative decision-making tools. Integrates with Slack.

RESOURCES FOR STRENGTHENING THE PRACTICAL FOUNDATION

Agile Project Management handbook, Emerson Taymor
Lean Startup book summary, Eric Ries
The Cynefin Framework, Dave Snowden, (Video)
Evaluative Learning, Maria Scordialos and Vanessa Reid
Double Loop Learning, Chris Argyris
Developmental Evaluation Primer, Jamie Gamble

OTHER HELPFUL ONLINE TOOLS

Filesharing:
Google drive
Dropbox
OneDrive (Microsoft compatible)
iCloud (Mac compatible - requires Apple ID)

Online meetings
Zoom
Appear in
Skype
Maestroconference (requires paid subscription)

Online collaborative canvas
Mural.co
Canvanizer
Realtimeboard

[16] http://www.chriscorrigan.com/parkinglot/probes-prototypes-and-pilot-projects/

ECONOMIC FOUNDATION

"A little thought and a little kindness are often worth more than a great deal of money." - John Ruskin

The Economic Foundation focuses on the inputs required to sustain the health of the collaboration and the individuals within it. We use the term economy to mean the careful management of all available resources. The key to this foundation is that the economy should be hosted consciously, regardless of the nature of collaboration it serves. We consider that monetary transactions are only part of the economy. The Economic Foundation also includes other resources, non-monetary transactions and value exchanges including materials, time, expertise, influence, learning, commitment etc.

Nothing damages relationships and creates conflict more effectively than unconsciousness around money and resources. Hosting the economy involves different things in different contexts. We see it as practicalities such as drawing up and overseeing the budget, managing payments and sending invoices, bookkeeping etc, but also making sure that needs and expectations are met and fairness is achieved when it comes to raising necessary income and distributing surplus resources.

Whether we like it or not, money is an effective currency for getting stuff done; ensuring that we have spaces to meet, food to eat and materials to support collaboration and our learning, such that we can achieve good results. We must acknowledge that money can be a sensitive issue for some and when hosted carelessly it can easily become a source of conflict, resentment and broken trust. When hosted well, it can help build trust and strengthen relationships within a team. Working consciously with money involves transparency, generosity and fairness rather than the pattern of secrecy, scarcity and competition that is all too familiar.

FOCUS

The economy, in the traditional sense of wise management and distribution of resources.

CORE QUESTION

What resources are we drawing on and how are we using them?

CORE PRINCIPLES FOR WORKING CONSCIOUSLY WITH ECONOMY[17]

1. **Transparency Builds Trust.** Secrecy undermines trust.

2. **Host the economy as a whole** with respect, consciousness and love.

3. **Be fearless about money** - alone and together.

4. **Be generous all round.** Don't take anyone for granted; regardless of what you are collaborating for. Life is a dance of generosity, not a business.

5. **If you have money, keep it flowing.** Don't hoard it. Money can only support life when it is in circulation (the word currency comes from the latin *currens* meaning 'in circulation).

[17]Based on principles related to hosting economy and gifting for AOH trainings, version 4.0, July 18, 2013, Ria Baeck and Mary Alice Arthur

CORE PRACTICES FOR WORKING CONSCIOUSLY WITH ECONOMY

Ask for what you need and offer what you can (without guilt or shame). Everyone in the team need not be paid the same; we all have different needs and it is helpful for at least one person to have an overview of individual and collective needs and resources.

Make sure everyone who offers real value to make the work happen is honoured appropriately for what they offer. Similarly, always honour real experience in the world (eldership and stewardship), without which the work could not happen at quality and with essence. This doesn't always have to mean financial remuneration, what is valuable is different to different people.

Practice Solidarity. Everyone in a core team holds responsibility equally, even if they entrust the accounting/bookkeeping to one or two. This includes sharing in any surplus and responsibility for any financial risk involved. When this is understood, people become more invested in the success of the collaboration.

Practice Transparency and Communicate Well. The whole team should have the opportunity to be informed (if they choose) around financial context, financial structures, financial strategy/intentions, distribution of profit/surplus.

Practice Trust. Give people the freedom to both ask for help and offer contributions

Prioritise spending on activities that strengthen the foundations of the collaboration, create movement towards primary goals and build capacity for the work to continue.

FURTHER RESOURCES

The Art of Conscious Economy - Video interview with Toke Møller (6')
Working Wisely with Economy - Teaching video by Toke Møller (53')
Event budget template
Start up budget template
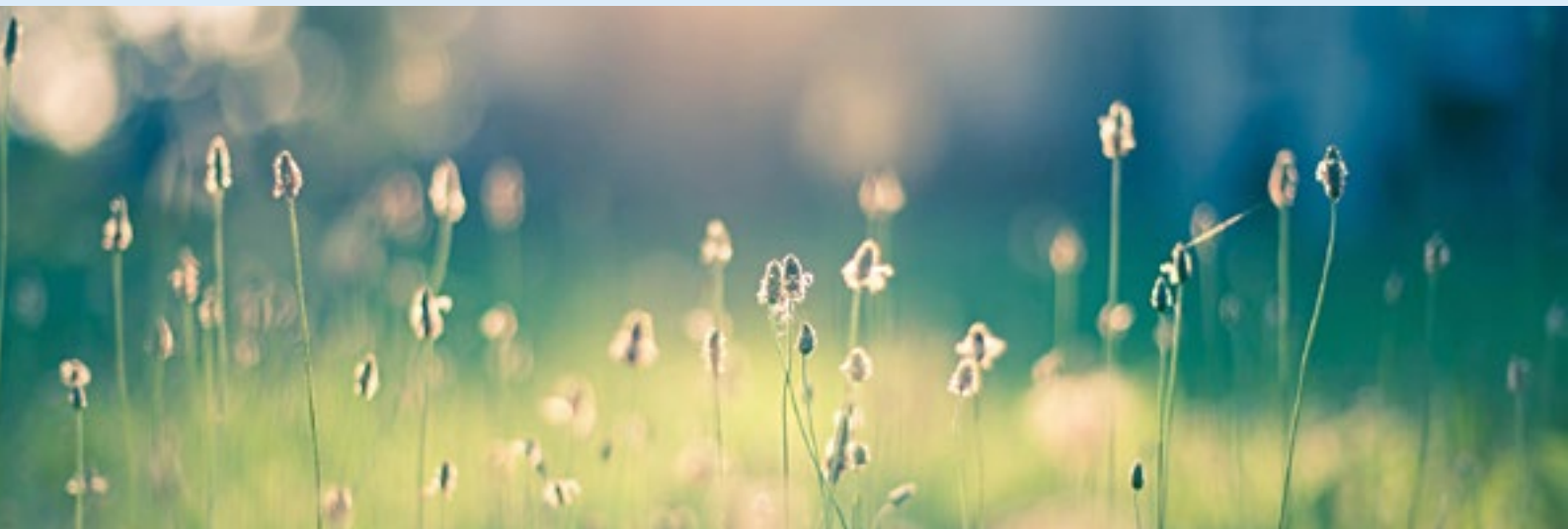The Business Model Canvas - Books excerpt
Business model generation introduction - Video
Expensify - Application that helps keep track of receipts and expenses, making it easy to create and share reports.
International money transfers compared
Paypal - Receiving online payments by credit card.

APPLICATION

Exercise 1 - Hosting the Economy for an Event

Creating a budget
Start with your intention. Define your project, current resources, funding model and create two budgets, i) a nice-to-have version based on the economy you would like to work with in an ideal scenario , and ii) a need-to-have version based on the minimum economy needed.

- Establish expected income from fees, seed money, sponsorship, grants etc.

- Establish projected expenses: Venue, Food, Accommodation, Travel Costs, Honoraries/Fees, Materials, Bank Charges etc

- Determine the fee level(s) for participation based on projected expenses, expected income and likely number and profile of participants.

Decide how to honour the value of different contributions; experience/stewarding, client or participant liaison, administration, accounting/ bookkeeping, hosting/facilitation, apprenticing

- **A minimum respectful fee/honorarium should always be included** as a fixed cost in the budget (not as a variable cost) so that everyone in the team can manage expectations and plan accordingly. Any changes to this should only be made after all parties have agreed.

- **Where there is more financial strength, more can be offered** in fees to paid members of the team or invested into other projects.

- **There should be a balance** between, and harmony around, what is being paid in "fees to the team" and the real-world value of that which they are creating.

Pricing
Context matters! Consider:
- Geography
- Target group - who needs to be part of the conversation?
- Who is paying?
- What sector are we working in? - Private, Public, Not for profit - Open trainings
- What is the level of complexity that we are holding?
- What amount of holding and emotional bandwidth is required?

Invite others into financial relationship to suit the context. When working with events/trainings/ workshops, it is sometimes possible to invite participants/customers who can afford more to pay more so that those who can afford less can pay less. However, everyone should offer something, however small. There is no free ride; for many of us this is a sincere and heartfelt practice of being at service to our species and planet at this time. The invitation should reflect this as an invitation into relationship and into ownership. For example, the economy in a learning community is relational ('new story' world view), and the economy in a training is transactional ('conventional worldview')

Setting up an account
Usually the planning of any event or training requires the use of a legal entity (business or association) to process money for tax purposes.

Receiving Income Payments/Generating Invoices
Set up a registration and payment processes. DIY solutions using Google Forms to gather participant information and communicate payment details are both simple and effective. There are also numerous ticketing and payment platforms ranging from completely free but with limited functionality, to quite versatile but pricy. See here for a list of 10 popular event planning platforms.

Good bookkeeping practice - keep track of receipts and invoices and reconcile all transactions with income and payment transactions on your bank statement. Any irregularities should be followed up and ironed out quickly. Memories fade over time.

Viability

If income in uncertain and running a deficit is not an option, **agree on dates and a process for making go/no-go decisions** out that leaves everyone feeling empowered and well-informed when the decision is ultimately made. Set this date before you need to outlay significant sums of money and base the decision on the likelihood of reaching the required level of income.

Making Payments

Pay bills and fees in the agreed time period. Failing to do this is not only disrespectful, but when dealing with individuals or small businesses, it can have negative consequences on cash-flow.

Tool 2 - Business models

It is important to think about the business model for your project, team or organisation. How is the work sustained? Who are you generating value for and who is paying for it? There are many ways to be creative about how to design the business model that serves your purpose, whether it is based on end users paying directly, having donors or sponsors, being a connector between different groups or segments in the markets.

The business model is always influenced by our role and what kind of work we are doing. Perhaps we working as an external consultant/facilitator for larger organisations, we offering open trainings to the public, or we employed as within a an existing organisation or maybe working independently as a freelancer or sub contractor. Or it may be that we are working voluntarily on a cause we are passionate about.

Read more about business model generation and The Business Model Canvas.

PRACTISING GROUNDWORK

We hope that this Practice Guide has provided you with enough understanding and inspiration to begin practising Groundwork in your life and work - that is that whole point. As the saying goes, "what you practice, you will become."

If you would like to deepen your Groundwork practice, we invite you to join our growing practice community. You can find us on Facebook and we'd love to hear what you're learning.

You can also read more on our website
www.thegroundwork.co, or contact us by email: james or rowan @thegroundwork.co