Template: Design and Planning for Working in Complexity

Chaordic Design Applied Practice Exercise

Applying the Method

We encourage you to practice using this approach as early in the design and planning process as possible. You may already have in mind that it is a meeting, engagement process or a larger initiative, though as much as possible you are encouraged to engage with the groundwork steps before jumping to finalizing your structure. This method is designed to provide you with deliberate practice in slowing down, asking important questions of yourself and together with others, learning, sensing, and carefully articulating as you set the groundwork and invite people into participatory and collaborative work to engage complex challenges. The time and intentional process is a worthy investment that can lead to better use of resources over time as well as better outcomes and relationships.

Groundwork

The first stage of design and planning enables you to explore and understand the context of your work and what is actually needed more deeply and ensure that it is connected to a clearly articulated shared purpose that helps to focus and anchor the work. Attention is given to who the key people are that need to be included and principles are agreed to guide the ongoing process and working relationships.

GROUNDWORK EXERCISE

Identify something in your sphere of leadership or work, and that you are in the early stages of bringing some focus, planning and shape. Choose something that has some elements of complexity to it and that would benefit from an engaged, collaborative approach. It may be fully open to any form or already have some assumed structure (such as a meeting). Either way, bring as much open-mindedness to each step of the process as possible.

(Note: If you do not have a leadership role that gives you the decision-making authority to choose the planning process in any of your work, you can still do this exercise to explore what is possible and share your ideas with your team. You may still be able to bring some leadership or influence from your position based on what you learn in the exercise.)

Specific Focus of Inquiry and Work:

Write a one sentence "headline" that roughly describes the focus of the work/inquiry you are engaging with.

NECESSITY:

"Necessity" (sometimes referred to as "need") refers to the conditions in the current state of affairs that are telling you there is a genuine, pressing need for something to happen, be addressed or changed in some way. The necessity is the compelling and present reason for doing anything. Identifying the necessity helps to anchor an invitation. Sensing the necessity is the first step to designing a meeting, organizational structure or change initiative that is relevant.

You may have some initial thoughts about the "necessity" from your own observation and assumptions. It is also important to engage others and invite more perspectives to help more thoroughly and accurately identify, understand, and articulate the necessity for the work, whatever form it takes. It is particularly important to listen to the people who are part of the process and the people who are impacted by the outcomes.

NECESSITY NOTES:

Reflect and write a brief description of your current/early thinking to describe the necessity you see for this meeting or initiative.

Context is important.

- What is going on right now that makes the work of this meeting or initiative important?
- What are the challenges and opportunities we are facing?
- What are we seeing or hearing that tells us it is important that we do this work?

Who else do you need to speak with and bring into the conversation to hear different perspectives and to understand the necessity more fully?

PURPOSE:

"Purpose is the invisible leader" - Mary Follett Parker

Purpose statements are clear and compelling and connected to the identified necessities. They are forward looking and describe the intended direction of travel of our work together. Discerning a shared purpose is helpful to guide work, invite others to participate in meaningful ways, to seek outcomes and evaluate your work together.

Possible questions to consider:

- If this work should live up to its fullest potential, what would be possible?
- What could this work do/create/inspire/result in?
- What are the stories, experiences, or outcomes we want to see more of?

Purpose notes:

Reflect and Write: What is the purpose of this work? (1-3 sentences.)

PEOPLE:

Who are the people that are important to include in this meeting or work/initiative? Why is it important that these people attend this meeting? Who are the people that can provide insights, different perspectives, bring needed skills or strengths? Who needs to be informed about what happens in the meeting and/or the outcomes? Be sure to consider who has lived experience as well as other expertise, who is impacted and who has power to influence the outcome.

Possible questions to consider:

- Who needs to be included? Who needs to be informed?
- Who needs to give permission? Whose buy-in is important?

People notes:

PRINCIPLES:

Principles guide your work individually and as a team. Principles of cooperation help us to know how we will work together. It is very important that these principles be simple, co-owned and well understood. These are not principles that are platitudes or that lie on a page somewhere. They are crisp statements of how we agree to operate together so that over the long term we can sustain the relationships that make this work possible. The best principles help to guide us when the plan breaks down, so make them observable and simple to remember. It is valuable to discuss and create principles together as a group.

Examples: Ensure everyone has a chance to speak or ask questions before key decisions are made; include the people impacted in key conversations.

Principles notes:

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Implementing

OUTPUTS:

Whether you are planning a single meeting or an ongoing strategic initiative, it is crucial that you focus on the outputs: the concrete and intangible results and effects of your work.

All work will result in both **tangible** and **intangible** outputs. Both are important and interconnected. We often overlook the intangible outputs and focus on the tangible outputs, only to find that the quality and sustainability of the tangible outputs requires the intangibles. In fact, lack of key intangibles such as trust, buy-in, confidence, positive relationship, can undermine the purpose of the work and the value of the tangible outcomes.

Take time to discuss and articulate what tangible and intangible outputs are needed from this meeting, keeping in mind the purpose of the meeting, the people that are coming and both immediate needs and the ongoing work and role of this group.

You can use this outline as part of your post meeting reflection and evaluation process to continue to improve the effectiveness of your meetings and associated work together.

- What are the tangible outputs that your meeting will create?
- What are the intangible affects you want your meeting to have? Why are they important?
- How will you communicate these outputs, and their value, to those who need to hear about them?

Outputs notes:

List desired **tangible** and **intangible** outputs:

Tangible:

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Intangible:

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Architecture of Implementation

The architecture of implementation refers to what you will build to sustain the work you have created. If you are doing innovative work in your meeting or team, you will need to develop an innovative approach to sustaining it. It is critical that you make decisions about how you intend to support the outcomes of the process before you begin to undertake the substantive work.

- What resources (especially time, money and people) do we need to sustain our work together that comes out of this meeting or this series of meetings?
- What capacity and learning do we need to build to sustain this work?
- How can you leverage power and relationships to support the sustainability of the work?

Consider these questions yourself, and in conversation with others (core team, others).
Connect to the need and purpose.

Architecture of Implementation notes:

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Structuring

CONCEPT:

The concept represents a high-level framework in which you can develop and test ideas. Working with a concept allows you to prototype and experiment early and raise any limiting beliefs that you might have. This can be a short or extensive process depending on the context. For meetings this is the space where you can think more creatively about how you might want to structure the meeting in some new ways in connection to purpose and both tangible and intangible outputs.

- What is a good high-level approach to addressing your need and meeting your purpose?
- What do you want to experiment with or try out, to test its effectiveness?
- What do you already know will be an effective way to do this work?

Consider these questions yourself, and in conversation with others (core team, others).
Connect to the need and purpose.

Concept Notes:

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LIMITING BELIEFS:

What fears, attachments and assumptions are arising as you consider new or bold possibilities for structure? *What are you afraid will happen if you try this new concept? What same old ways of doing things are you attached to and why? (Note: see the Limiting Beliefs section of the overview for ideas of how to work with limiting beliefs.)*

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STRUCTURE:

Once the concept has been chosen and we have worked through the limiting beliefs, it is time to create the structure that will channel our resources and enable work to happen. This is where we decide upon process structure, a plan of action and define the roles and responsibilities of those involved. It is in these conversations that we also make decisions and choices about the resources of the group: time, money, energy, commitment, and attention.

Meetings:

- What form of meeting and what processes will best serve the purpose and lead to the tangible and intangible outcomes we intend? (This can include a mix of processes including what happens in: whole group, small group, partnering, individual work or reflection.)
- Consider how the agenda is created and if parts of the agenda would benefit from input or co-creation.
- How will decisions be made and by who? Consider which decisions are made by the group and which are made by the leader or others with input from the group.

Initiatives:

- What form will the work take? (Examples: event, a series of events, an intervention, a program, an organization….)
- What resources are needed in time, money and attention and where are these going to come from?
- What will happen with the results of the work and decisions in the meeting?
- What logistical questions need to be resolved?
- What expertise can help us with our work?

Structure Notes:

Concerns, Considerations, Potentially Limiting Beliefs:

PARKING LOTS AND PROCESS.

It is important to be aware of, and take time to articulate and discuss concerns, considerations and potentially limiting beliefs at many points along the design and planning process. In order to both invite and name them and also keep the process moving forward, it can be helpful to introduce and use "parking lot" spaces to make note of these issues (a flip chart or note area that is visible and accessible to the group) and then bring process/discussion space to them periodically. *It is important to return to these notes with the group before final decisions are made in order to build trust that their considerations and concerns have been heard and to access the value of the different perspectives.*

CONSIDERATIONS AND CONCERNS "PARKING LOT":

Note: Any considerations or possible concerns related to this meeting, that come to mind in your own reflection or that you are hearing from others that are involved. These can help guide further discussion, inquiry, or investigation in your planning. For example, cultural considerations; timing considerations; differences in approach or opinion.

Considerations: (Key things we want to remember to consider before deciding.)

Concerns:

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LIMITING BELIEFS:

Be aware of and make note of your own limiting beliefs that come up as you name a bold purpose, invite a diversity of people and perspectives, explore more creative or new ways of structuring, inviting, working.

Where are we stuck, avoiding, resistant, fearful in this work?

- What do we fear about pursuing this idea or conversations? About this new way of leading or working together?
- Who are we judging or in conflict with? Avoiding, blaming or excluding? What assumptions are we making about that person or those people? What other perspectives can we bring or invite?
- Where am I/we stuck in cynical thinking? "This will never work!"
- What outcomes or ways of doing things am I / are we attached to that are keeping us stuck? "It has to be done the same way we always do it."

Limiting Beliefs Notes:

See prompts above. What do you notice and hear?

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LIMITING BELIEFS: PERSONAL LEADERSHIP

When you think about stepping into participatory leadership for this meeting or initiative and potentially bringing some change to how the meeting is run or the work is done, what fears, stresses, resistance, or avoidance comes up for you? What are you afraid will happen? What assumptions or judgements do you hold about specific people, the group?

Note: you can later use the Limiting Beliefs Inquiry Exercises to engage your own fears, assumptions and judgements so you can plan, invite and host with more clarity.

Ongoing Reflecting, Learning and Adapting

Working with complex challenges and groups of human beings requires ongoing learning and adjusting based on what we are learning as we move forward in the work. Complex challenges have emergent properties that show themselves over time, and as we act there may be positive or not positive impact with regards to the purpose. It is important to keep connected to the identified needs and purpose and intended outcomes and, take time to reflect, learn and make informed adjustments to your structure and approach as needed. You can practice this yourself as a leader and it is also important to take time to reflect and learn with others involved in the work. In complexity diverse perspectives are needed for the best outcomes.

What am I learning about myself in this work?

What am I /we learning about this context and the work itself as it unfolds?

What is happening as expected? What is happening that is unexpected? What is serving the purpose? What is not serving the purpose?

What am I/we learning about the people (on my team, stakeholders, people impacted, etc.)

From my own observation and also feedback received.

What adjustments do I / we need to make based on learning so far?

Continue with developing / implementing, reflecting, learning and adjusting. Repeat.
Do this together with others.