



Liberating Structures

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Every act of creation is first an act of destruction. – Pablo Picasso

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1. The Workshop

Introduction – Aim

Liberating Structures (LS) are simple rules that make it possible to include and engage every voice from each generation in shaping the future. The LS repertoire consists of practical methods versatile enough for anyone to use for a wide array of activities and challenges. None require expert training. Seeing them in action once is enough for many novices to get results and adapt them in other settings.

Since the book — *The Surprising Power of Liberating Structures*¹ — was published in 2013, people have spread Liberating Structures over all continents and in every professional domain. LS helps educators change the way people interact and collaborate to achieve better results than with presentations, reports and other traditional methods. In the cross-generational collaboration context, LS provides simple and concrete tools to improve collective performance. They organize participants into different spatial arrangements and intergenerational group configurations and distribute participation and order.

Liberating Structures are so-called because they are designed to engage and involve everyone in a cross-generational work environment. In a way, they "liberate" everyone's contribution to the group's success (Lipmanowicz & McCandless, 2013). Interaction and collaboration with others often determine your success at work and in other areas of your life. You will find that each Liberating Structure has its specific advantages. Your new language will be infinitely adaptable and applicable if you create various combinations suitable for every situation in your life, whether it is a challenge or an opportunity, big or small, complex or straightforward.

You will also find that the power of Liberating Structures is not only amazing but also contagious. As you practice Liberating Structures, those around you will enjoy the experience and see the unexpected benefits. You will likely help and encourage them to develop their alphabet. They will become your fellow practitioners, grateful to you for helping them learn skills that will serve them forever. You will also find that Liberating Structures is easily scalable and can be used by a small or large team, department or function, organization, class, school, community, or social movement. This makes them useful for everything from a simple meeting to a large project or system-wide transformational initiative. You'll also find that they can help you better structure individual interviews and make them more productive. Moreover, they can also help you talk to yourself more effectively and change the way you think, plan, and decide.

You'll also find that they can help you make individual meetings more structured and productive. Moreover, they can also help you have more effective conversations with yourself and transform the way you think, plan, and make decisions. When asked who

¹ H. Lipmanowicz & K. McCandless, *The Surprising Power of Liberating Structures: Simple Rules to Unleash A Culture of Innovation* (Black and White Version), Paperback- Kindle Unlimited, 2014

the perfect candidates for deploying Liberating Structures are, 'Everyone'. Liberating Structures is for executives, managers, middle managers, and frontline workers; teachers and professors, administrators, assistants, and students; adult trainers, officers, and soldiers; government employees and politicians; consultants and any trainers; community leaders and philanthropists and many others.

For the benefit of GSmart target groups, we provide information about the basic principles of LS, its main advantages and benefits, and how to use them for cross-generational collaboration. We also show the possibilities of their practical application based on the results of the GSmart project on cross-generational collaboration. According to research, cross-generational collaboration differs between the older generation - BB - and the younger generation. For generations, X, Y, and Z, intergenerational change in attitude, teamwork, trust, openness to experience, serenity, friendliness, and honesty must be specifically encouraged and reinforced to enable cross-generational collaboration.

Furthermore, the most important element of cross-generational cooperation is the exchange of knowledge and experience, which complements the mutual skills of employees of different ages to perform their professional duties and functions. The older people interviewed see the positive aspects of intergenerational cooperation in the exchange of knowledge and experience, in the acquisition of new skills, in learning from each other, and in helping to solve tasks, problems, or crises. One of the most frequently cited difficulties in dealing with generations concerns age-related stereotypes and prejudices in the workplace. Therefore, every company, institution, or organization needs a human resource management strategy and generational diversity management to improve the work processes of the different age groups.

A Liberating Structure-activity can transform a meeting, a classroom, or a conversation. Regular participation in many of these activities can transform an organization, a community, or a life (Lipmanowicz & McCandless, 2013). Thus, this workshop will provide a set of practical exercises for high-level organizations that will broaden and develop the skills of their trainers and other staff members who support adult learners. The work environment and the quality of life promoters of older people, e.g., B. Universities of the Third Age, will be considered. At the end of the workshop, the target groups will apply the LS tools to overcome cross-generational collaboration issues

2. Workshop content

The workshop consists of thirteen training activities in a set of simple microstructures. Individuals and groups can choose what suits their likes and dislikes then mix and match them flexibly to address their challenges. All the activities are consolidated in a pack. Educators are asked to read and understand the concept. They can also consult suggested resources for further information. It includes a brief presentation of what the LS is about. It also explains how the LS can help the project's target groups understand and address the organizations' needs in cross-generational collaboration. We will also show how the LS can support new services' design to promote cross-generational collaboration in working and everyday life domains. It requires 10-12 hours of training (It depends on the trainer and the number of participants).

The workshop consists of the following parts:

1. Information about the LS
2. How to design a training session using the LS
3. Practical application of the LS in a training session
4. Summary
5. Self-assessment test
6. References and resources

3. Information about the LS

The conceptual basis for Liberating Structures can be traced back to the teachings of the famous Greek philosopher Socrates over two thousand years ago and more recently to Twentieth-Century educators and scholars such as Dewey² (1938), Bruner³ (1960, 1973, 1996), Piaget⁴ (2001/1947) and Montessori⁵ (1986). In their ways, all criticized the industrial model of public education for its emphasis on specialized knowledge and its overemphasis on the content of instruction rather than attention to process, Experience, and self-discovery (Kolb, 1984)⁶. All valued hands-on, experiential discovery and stressed the importance of interaction, dialogue, and collaboration in the learning process.

Liberating Structures are more than a set of microstructures to address and use complexity productively rather than flattening, ignoring and pushing it away. LS helps organizations address some of the most difficult aspects of working together in various settings to manage change. The methods are inspired by complexity science and were developed by Henri Lipmanowicz and Keith McCandless.

Liberation takes courage. The first wave of co-created ideas, decisions, actions, and agreements may seem quiet, crude, or ephemeral. They often come from overlooked details unusual suspicions and must be extracted from chaotic or ambiguous situations. It is much easier to see significant system failures (and thus arrive at standardized results) than to see how generalized local solutions make a difference. System problems scream, generalized solutions whisper.

LS is not the best practices imposed on an entire organization. They do not depend on time-consuming and costly efforts to train people to change their behavior. Instead, they are a set of simple microstructures from which individuals and groups can choose their likes and dislikes, then mix and match them flexibly to meet their challenges. When presenting LS, many of the five significant conventional approaches people always use (presentations, open discussions, facilitated discussions, situation reports, and brainstorming) lose their appeal or go out of style.







² J. Dewey, *Experience and education*. New York: Macmillan, 1938.

³ J. Piaget, *The psychology of intelligence*. (M. Piercy, Trans.). New York: Routledge, 2001. (Original work published 1947)

⁴ J. Bruner, *The culture of education*. Cambridge, MA: Harvard University Press, 1996

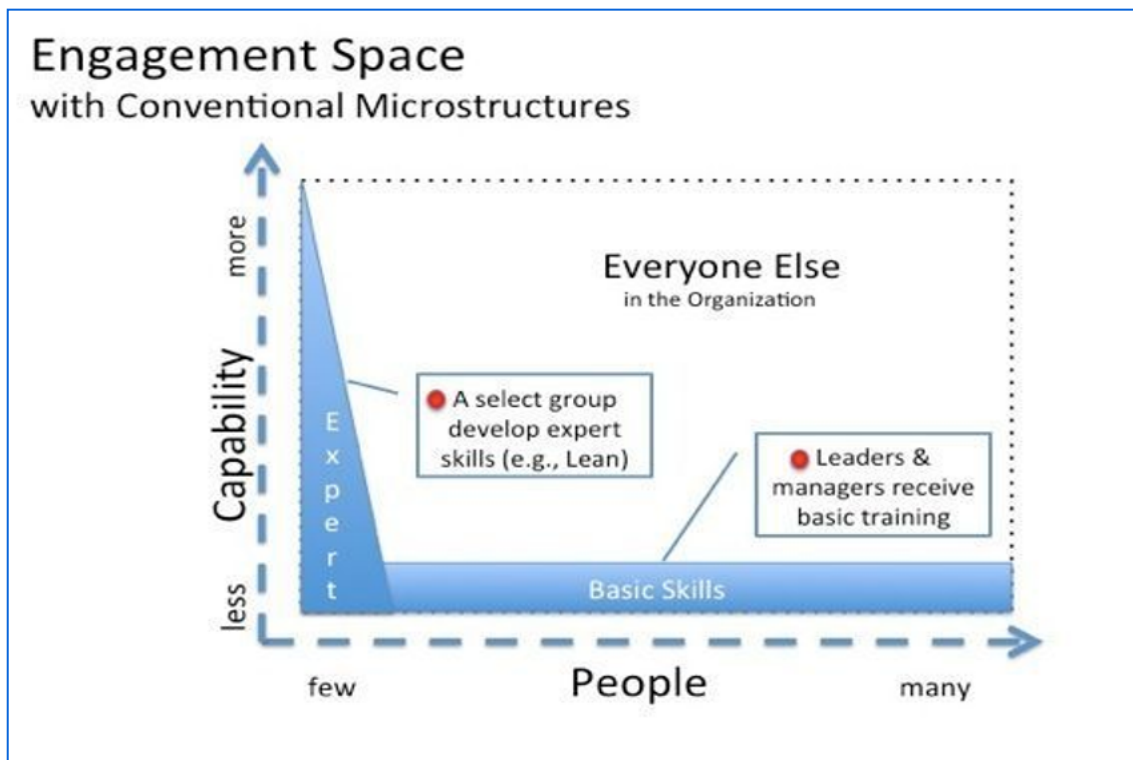
⁵ M. Montessori, *Discovery of the child*. New York: Ballantine, 1986

⁶ D. A. Kolb, *Experiential learning: Experience as the source of learning and development*. Upper Saddle River, NJ: Prentice-Hall, 1984

LS Development Phases 					
# LS in use	USER		MAESTRO	GROWTH FOCUS	TIPS & FEARS
0	Despairing Cynic <i>Unconscious Incompetence</i>		Authority, Expert	Guide exploration & self-discovery toward practical results. <i>LS as tools that play well with other change efforts.</i>	Focus on noticing what how structure liberates & confident first steps. Fear: will I look foolish or unprepared?
5	Cautious Optimist <i>Conscious Novice</i>		Facilitator, Teacher	Focus on clarifying purpose, including unusual suspects, and design skills (stringing & inviting). <i>LS as inclusive & engaging alternatives to conventional methods in use.</i>	Design effective meetings + find LS co-leaders. Fear: can we generate better-than-expected results w/o pre-cooked goals/agendas/visions?
15+	Rapturous Super-User <i>Conscious Competence</i>		Coach, Co-Designer	Focus on expanding your repertoire & use in diverse settings + messy challenges. <i>LS as generating innovative results while shifting relational patterns & habits.</i>	Focus on spreading LS & 5 micro-design elements. Expand to action research & strategy. Fear: is it possible to prevent snapback to old habits?
33...	Maestro Minimalist <i>Unconscious Competence</i>		Self-Authoring Participant	Transfer design expertise to the group. Enter new domains & reach across multiple scales. <i>LS as pattern for simultaneously & mutually shaping next steps and the future.</i>	Connect users & challenges across domains. Invent new LS. Fear: as LS becomes the routine way we work together, have I designed my own obsolescence?

(Resource⁷)

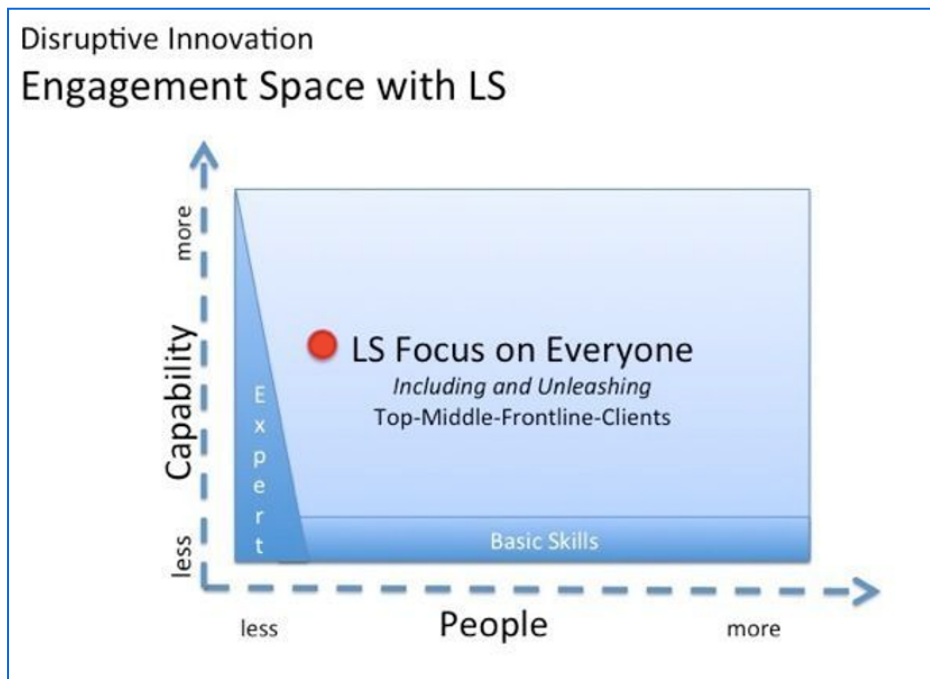
Conventional investments focus on developing core leadership skills and training experts (e.g., facilitator training, change management). The rest of the population, the vast majority, is not involved or engaged in learning to shape their future together.



(Resource⁷)

⁷ Liberating Structures, including and unleashing everyone:
<https://www.liberatingstructures.com/ls-disruptive-innovation/>

The LS allows everyone to participate in the development of skills and use them on a daily basis without extensive training. All include leaders, managers, front-line staff, and clients.



(Resource7)

LS users report that LS complements design thinking methods. Design thinking practitioners also find LS complementary. So it is a kind of fixed continuation of the Workshop 1 about Persona tool of Design Thinking Approach. LS allows non-designers to participate more fully in ethnographic observations and prototyping efforts. With design thinking methods, LS complements its efforts to spread participation and unleash creativity at all levels of the organization. Many more people can be involved without extensive training.

In short, LS is suitable for such challenging work environments:

- When key players in the system have unequal levels of information and power.
- When diverse types of people & professions (with different mental models) are required to accomplish goals.
- When formal links among players lose or are weak in many cases?
- When the evidence to guide global practice is relatively thin, not “translated” for application in varied local contexts by diverse workers?
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- When the evidence to guide global practice is relatively thin, not “translated” for application in varied local contexts by diverse workers?
- When there are gaps and time lags in work or community setting (that may have permitted a more deliberate or linear approach) evaporated, reducing opportunities “to figure it out” or “get it right”?

4. How to design a training session using the LS

Previous experiences also show that using Liberating Structures does not require extraordinary skills or leadership qualities. The structures are so simple that anyone can use them at any level. They do not require extensive training. LS does not require leaders to develop new and complex skills. They ask people to do something they can do, making small changes in the practices they usually use when working together. See Table 1 for the ten principles of Liberating Structure that show how it turns out to be a perfect training tool in a cross-generational context.

Table 1. Ten Principles of Liberating Structures

When Liberating Structures are part of everyday interactions, it is possible to:	Liberating Structures make it possible to: START or AMPLIFY these practices that address opportunities and challenges with much more input and support:	Liberating Structures make it possible to: STOP or REDUCE these “autopilot” practices that are encouraged by conventional microstructures:
1. Include and Unleash Everyone	Invite everyone touched by a challenge to share possible solutions or invent new approaches together. Actively reach across silos and levels, beyond the usual suspects.	Separate deciders from doers. Appoint a few to design an “elegant solution” and then tell all others to implement it after the fact. Force buy-in. Confront resistance with hours of PowerPoint presentations.
2. Practice Deep Respect for People and Local Solutions	Engage the people doing the work and familiar with the local context. Trust and unleash their collective expertise and inventiveness to solve complex challenges. Let go of the compulsion to control.	Import best practices, drive buy-in, or assume people need more training. Value experts and computer systems over local people and know-how.
3. Never Start Without a Clear Purpose	Dig deep for what is important and meaningful to you and to others. Use Nine Whys routinely. Take time to include everyone in crafting an unambiguous statement of the deepest need for your work.	Maintain ambiguity by using jargon. Substitute a safe short-term goal or cautious means-to-an-end statement for a deep need or a bold reason to exist. Impose your purpose on others.
4. Build Trust as You Go	Cultivate a trusting group climate where speaking the truth is valued and shared ownership is the goal. Sift ideas and make decisions using input from everyone. Practice “nothing about me without me.” Be a leader and a follower.	Over-help or overcontrol the work of others. Respond to ideas from others with cynicism, ridicule, criticism, or punishment. Praise and then just pretend to follow the ideas of others.
5. Learn by Failing Forward	Debrief every step. Make it safe to speak up. Discover positive variation. Include and unleash everyone as you innovate, including clients, customers, and suppliers. Take risks safely.	Focus on doing and deciding. Avoid difficult conversations and gloss over failures. Punish risk-takers when unknowable surprises pop up.

6. Practice Self- Discovery Within a Group	Engage groups to the maximum degree in discovering solutions on their own. Increase diversity to spur creativity, broaden potential solutions, and enrich peer-to-peer learning. Encourage experiments on multiple tracks.	Impose solutions from the top. Let experts "educate" and tell people what to do. Assume that people resist change no matter what. Substitute laminated signs for conversation. Exclude frontline people from innovating and problem solving.
7. Amplify Freedom and Responsibility	Specify minimum constraints and let go of overcontrol. Use the power of invitation. Value fast experiments over playing it safe. Track progress rigorously and feed back results to all. Expose and celebrate mistakes as sources of progress.	Allow people to work without structure, such as a clear purpose or minimum specifications. Let rules and procedures stifle initiative. Ignore the value of people's understanding how their work affects one another. Keep frontline staff in the dark about performance data.
8. Emphasize Possibilities: Believe Before You See	Expose what is working well. Focus on what can be accomplished now with the imagination and materials at hand. Take the next steps that lead to creativity and renewal.	Focus on what's wrong. Wait for all the barriers to come down or for ideal conditions to emerge. Work on changing the whole system all at once.
9. Invite Creative Destruction to Enable Innovation	Convene conversations about what is keeping people from working on the essence of their work. Remove the barriers even when it feels like heresy. Make it easy for people to deal with their fears.	Avoid or delay stopping the behaviors, practices, and policies that are revealed as barriers. Assume obstacles don't matter or can't be removed.
10. Engage in Seriously Playful Curiosity	Stir things up—with levity, paradoxical questions, and improv—to spark a deep exploration of current practices and latent innovations. Make working together both demanding and inviting.	Keep it simple by deciding in advance what the solutions should be. Control all conversations. Ask only closed yes or no questions. Make working together feel like drudgery.

(Resource⁸)

Your chances of living a "good life" for yourself and those around you, at work will increase dramatically. Since Liberating Structures have been developed and practiced by participants and staff in many different countries and contexts, we have concluded that you cannot live a "good life" if you do not know how. Therefore, our advice is to apply simple methods that we call Liberating Structures regularly.

For leaders, this means creating opportunities to learn Liberating Structures in workshops or facilitating their learning in collaboration with others. It means supporting the development of communities of practice throughout the organization, so that cross-generational staff can easily connect and learn from each other. Experimentation should be encouraged, and successes and failures should be shared.

⁸ H. Lipmanowicz, et al., *Liberating Structures, Engaging Everyone to Build a Good Life Together*In H. Wang (Ed.), *Communication and "the good life"* (International Communication Association Theme Book Series, (2), 233-246). New York: Peter Lang, 2015.

Staff members, managers, frontline staff, and professionals such as educators or trainers may not have access to many resources. Therefore, your starting point will not be a workshop but a single application of a version structure or a small number of structures in a session with your team or colleagues. In our experience, the most effective approach is to take small but frequent steps with a full report after each step. Liberating Structures are extremely practical. Our world is increasingly complex, interdependent, and culturally diverse. In various most pressing challenges across geographic, cultural, and technical boundaries, simple methods that help us collaborate productively are essential to progress.



5. Practical application of the LS in a training session

The use of Liberating Structures spreads most effectively when people experience and discover what they make possible. This module will train cross-generational exploration of creative destruction based on LS. During this training, we will make sense of the transformation we are in the middle of letting go of ideas and dreams that are no longer serving us, and look for new ones.

In regards to the simplified Bloom's taxonomy (ASK: A – attitude, S – skills, and K – knowledge), the training session participants will gain such new features:

At the level of attitude.

- They will change attitudes towards aging and its effects.
- They will adopt new attitudes to aging and learning in working life and society.
- The activities will help participants enrich the quality of observation and insights before expression.
- This practice is also effective for building cross-generational collaboration.
- They will focus on commonalities that will direct their energy positively, forward-thinking way.
- They will have more flexible and realistic thinking about each other.
- They will become more open to learning from each other and helping them to learn from each other.
- They will build a shared understanding of how people develop different perspectives and ideas.
- The activities will build naturally toward consensus or shared understanding, and in that way, they will build trust by acting altogether to remove barriers.
- They will move away from blockage, negativism, and powerlessness.

At the level of skills

- They will be able to learn from each other through social learning.
- They will be able to generate new ideas and momentum for innovation.
- They will develop an ability to work across disciplines and functional silos.
- They will learn to formulate problems and challenges.
- They will be able to identify, value, and build on one another's skills and experiences, a key point for modern workplaces.
- They will be able to develop relationships across the team.
- They will be able to apply new ways of conduct according to what they have learned.
- They will be able to discover their individual and collective power.
- They will refine listening and consulting skills.

- They will become more receptive to change, regardless of age.
- They will be able to solve problems together in a short period of time (group problem-solving skills).
- They will build listening, storytelling, pattern-finding, questioning, and observing skills.

At the level of knowledge

- Thanks to the training session's activities, the participants will learn how to create resilience and absorb disruptions by reorganizing programs together.
- They will learn how to address intractable problems or conflicts by unleashing self-organization.
- They will learn how questions are more powerful than answers because they invite active exploration.
- They will change their preconceptions about each other. The activities will build trust so that group members can share accountability with integrity.
- They will learn to articulate functional and personal needs.
- They will learn to take responsibility for tackling the issues they care about and what does or does not happen.
- They will learn how to face the different scenarios of cooperation,
- They will be able to analyze their behaviors and collaboration conflicts and the activities' results to improve their performance.

Such GSmart competencies can arise from the LS's educational work on cross-generational collaboration. Our research results clearly show some stereotypes about X, Y, Z, BB, and their perceived lower trainability in the workspace. For older workers, lack of flexibility and poor cost-effectiveness is an issue compared to younger workers. These are often used as arguments for not investing money in their training and development (van Vianen, 1997).

There is an ambiguity in employers' attitudes towards senior workers. While senior workers' skills and knowledge are regarded as obsolete, they are also viewed as loyal and reliable: even more so than younger workers (Walker, 1997). However, studies on age and skill obsolescence are inconsistent, suggesting either a positive, neutral, or negative relationship between age and performance (Sterns et al., 1994).

In terms of social learning Multiple social learning channels, such as online discussion, audio-video interactions, peer-coaching, or Slack collaborative environment, will foster a mutual understanding by cross-generational social competences. Multi-channel communication through the cloud-based systems such as Google Workspace for Education and the Slack collaborative mobile environment will facilitate the integration of the GSmart's teaching and learning forms of the project. This procedure will enable us to constitute a bridge on cross-generational collaboration by education on and expansion of social competences. Through Slack platform the educators can ask questions directly about the parts they don't understand about the workshop. Slack can be a helpful way to contain FAQ to help the

trainers. Slack can accumulate FAQs you can take the opportunity to recognize that it is the preferred support channel and optimize it for this use-case.

This module contains a series of practical exercises to raise awareness in cross-collaboration through different generations known as BB, X, Y, and Z. The exercises' primary focus is to bring together all different generations to work and cooperate.

To make this happen, WORKSHOP 2 defines THIRTEEN EXERCISES based on the findings of the report:

1. 1-2-4- ALL
2. Conversation Café
3. What I Need from YOU (WINFY)
4. Troika Consulting
5. Eco-cycle Planning
6. 25/10 Crowd Sourcing
7. Making Space with TRIZ
8. Impromptu Networking
9. Tiny Demons
10. 15% Solutions
11. OPEN SPACES
12. User Experience Fishbowl
13. What? So What? Now What? W3

The training session's activities and the expected timing are explained below.

1.- 1-2-4- ALL

Especially for anybody who learns Liberating Structures by reading instead of direct experience, 1-2-4-All is a perfect place for a safe start. It is such a practical structure that any meeting would have to be exceptionally unusual not to offer at least one opportunity for using 1-2-4-All to good advantage. So start with this structure, and when you feel comfortable, try another. More than a dozen accessible structures are sufficiently simple to jump into and try out.

Engage Everyone Simultaneously in Generating Questions, Ideas, and Suggestions (30 min.)

What is made possible?

You can immediately include everyone regardless of how large the group is. You can generate better ideas and more of them faster than ever before. You can tap the know-how and imagination that is distributed widely in places not known in advance. Open, generative conversation unfolds. Ideas and solutions are sifted in rapid fashion. Most importantly, participants own the ideas, so follow-up and implementation are simplified. No buy-in strategies needed! Simple and elegant!

Five Structural Elements – Min Specs

1. Structuring Invitation

- Ask a question in response to the presentation of an issue, or about a problem to resolve or a proposal put forward (e.g., What opportunities do YOU see for making progress on this challenge? How would you handle this situation? What ideas or actions do you recommend?)

2. How Space Is Arranged and Materials Needed

- Unlimited number of groups
- Space for participants to work face-to-face in pairs and foursomes
- Chairs and tables optional
- Paper for participants to record observations and insights

3. How Participation Is Distributed

- Everyone in the group is included (often not the facilitator)
- Everyone has an equal opportunity to contribute

4. How Groups Are Configured

- Start alone, then in pairs, then foursomes, and finally as a whole group

5. Sequence of Steps and Time Allocation

- Silent self-reflection by individuals on a shared challenge, framed as a question (e.g., What opportunities do YOU see for making progress on this challenge? How would you handle this situation? What ideas or actions do you recommend?) 1 min.
- Generate ideas in pairs, building on ideas from self-reflection. 2 min.

- Share and develop ideas from your pair in foursomes (notice similarities and differences). 4 min.
- Ask, “What is one idea that stood out in your conversation?” Each group shares one important idea with all (repeat cycle as needed). 5 min.

WHY? Purposes

- Engage every individual in searching for answers
- Avoid overhelping and the overcontrol-dependency vicious cycle
- Create safe spaces for expression, diminish power differentials
- Express “silent” conversations and expand diversity of inputs
- Enrich quality of observations and insights before expression
- Build naturally toward consensus or shared understanding

Tips and Traps

- Firmly facilitate quiet self-reflection before paired conversations
- Ask everyone to jot down their ideas during the silent reflection
- Use bells for announcing transitions
- Stick to precise timing, do another round if needed
- In a large group during “All,” limit the number of shared ideas to three or four
- In a large group, use a facilitator or harvester to record output not shared
- Invite each group to share one insight but not to repeat insights already shared
- Separate and protect generation of ideas from the whole group discussion
- Defer judgment; make ideas visual; go wild!
- When you hit a plateau, jump to another form of expression (e.g., Improv, sketching, stories)
- Maintain the rule of one conversation at a time in the whole group
- Do a second round if you did not go deep enough!

Riffs and Variations

- Graphically record insights as they emerge from groups
- Use Post-it notes in Rounds 2 and 3
- Link ideas that emerge to Ecocycle Planning
- Go from groups of 4 to groups of 8 with consensus in mind.

Examples

- Use after a speech or presentation, when it is important to get rich feedback (questions, comments, and ideas), instead of asking the audience, “Any questions?”
- A group of managers used two rounds of 1-2-4-All to redesign their less-than-stimulating weekly meeting.
- For a spontaneous conversation that starts after the topic of a meeting has been announced

- For a group that has been convened to address a problem or an innovation opportunity
- For unlocking a discussion that has become dysfunctional or stuck
- In place of a leader “telling” people what to think and do (often unintentionally)
- For a group that tends to be excessively influenced by its leader



2.- Conversation Café

Engage Everyone in Making Sense of Profound Challenges (35-60 min.)

What is made possible?

You can include and engage any number of people in making sense of confusing or shocking events and laying the ground for new strategies to emerge. The format of the Conversation Café helps people have calm and profound conversations in which there is less debating and arguing, and more listening. Sitting in a circle with a simple set of agreements and a talking object, small groups will engage in rounds of dialogue with little or no unproductive conflict. As the meaning of their challenge pops into focus, a consensual hunch is formed that will release their capacity for new action.

Five Structural Elements – Min Specs

1. Structuring Invitation

- Invite all the participants to gather in small groups to listen to one another's thoughts and reflect together on a shared challenge

2. How Space Is Arranged and Materials Needed

- Unlimited number of 5 to 7 chairs around small tables
- Talking object (e.g., talking stick, stone, or art object)
- Markers and one or two pieces of flip-chart paper per table optional

3. How Participation Is Distributed

- Everyone is included

4. Everyone has an equal opportunity to contribute

- How Groups Are Configured
- Mixed, diverse groups of 5–7 participants

5. Sequence of Steps and Time Allocation

- State the theme of the conversation, usually in the form of a question
- Explain there will be four rounds of conversation at every table, two first rounds using a talking object, the third one as open conversation, and a final round with the talking object. Give the duration of each round.
- Distribute the talking objects
- Ask for someone at each table to volunteer as the host. The host is a full participant whose role is to gently intervene only when a participant visibly fails to observe one of the six agreements, most frequently talking on and on
- First round with the talking object: each person shares what he or she is thinking, feeling, or doing about the theme or topic. 1 min. per person
- Second round with the talking object: each person shares thoughts and feelings after having listened to everybody at the table. 1 min. per person
- Third round: open conversation (option to use talking object). 20–40 min.

- Fourth round with the talking object: each member shares “takeaways.” 5–10 min.

WHY? Purposes

- Make sense of a complex, difficult, or painful situation and lay the ground for being able to move on
- Generate new ideas and momentum for innovation
- Build shared understanding of how people develop different perspectives and ideas
- Avoid arguments based on lack of understanding
- Build trust and reduce fear with an opportunity for catharsis
- Help participants appreciate that conversation involves talking and listening

Tips and Traps

- Always use the talking object: they make the difference
- Have the host or participants reread the six agreements before starting the first round
- Do not assign tasks: there should be no intention that the dialogue will directly lead to action
- Host the dialogue like a dinner party, encouraging everyone to contribute while keeping the conversation open-ended and spontaneous
- If there is a problem, ask, “Are we following our agreements?”
- Encourage people to speak their mind
- Encourage quiet people to talk
- Select talking objects that may have symbolic meaning for participants
- Encourage participants to draw or record insights on the flip-chart “tablecloth”
- Learn more from Vicki Robin and friends, who created the Conversation Café for use in communities @ www.conversationcafe.org

Riffs and Variations

- All participants but one at each table can move to different tables every 20 minutes World-Café style (see www.worldcafe.com for more information).
- Link to Graphic Recording. Place flip-chart paper on each table to collect insights from each group. Encourage drawing and playful exploration.
- To move into action, string together with W3 (What, So What, Now What?), 15% Solutions, User Experience Fishbowl, or Open Space.

3.- What I Need from YOU (WINFY)

Surface Essential Needs Across Functions and Accept or Reject Requests for Support (55-70 min.)

What is made possible?

People working in different functions and disciplines can quickly improve how they ask each other for what they need to be successful. You can mend misunderstandings or dissolve prejudices developed over time by demystifying what group members need in order to achieve common goals. Since participants articulate core needs to others and each person involved in the exchange is given the chance to respond, you boost clarity, integrity, and transparency while promoting cohesion and coordination across silos.

Five Structural Elements – Min Specs

1. Structuring Invitation

- Invite participants to ask for what they need from others (often in different functions or disciplines) to be successful in reaching a specific goal
- Invite them also to respond unambiguously to the requests from others

2. How Space Is Arranged and Materials Needed

- Large room to accommodate 3 to 7 functional clusters of participants in different sections
- Chairs for a group of 3 to 7 people to sit in a circle in the middle of the room
- Paper for participants to record needs and responses

3. How Participation Is Distributed

- Everyone is included in his or her functional cluster
- Everyone has an equal opportunity to contribute

4. How Groups Are Configured

- Three to 7 functional clusters (no limit on number of participants in each cluster)
- One group of 3 to 7 spokespersons to speak on behalf of each functional cluster

5. Sequence of Steps and Time Allocation

- Explain the process by describing the steps below. Reiterate the goal or challenge being addressed to make sure that the context is the same for all. Emphasize that requests must be clear and specific if they are to receive an unambiguous yes or no response. Make it clear that no answers other than **yes**, **no**, **I will try**, and **whatever** will be allowed. Position the functional clusters around the room. 3 min.
- Functional clusters use **1-2-4-All** (or 1-2-All) to make a list of their top needs from each of the other functions in the room. Needs are expressed as requests that can be delivered with care and nuance in the following form: **“What I need from you is ____.”** Clusters reduce their lists to two top needs, write these down in their expected form, and select a spokesperson to represent the cluster. 5–15 min.

- All spokespersons gather in a circle in the middle of the room.
- One by one, spokespersons state their two needs to each of the other spokespersons around the circle. At this stage, spokespersons take notes of requests, but no one gives answers or responses. 15 min.
- Working individually (or by conferring with others in their functional cluster), each spokesperson writes down one of four responses to each request: **yes, no, I will try, or whatever** (whatever means the request was too vague to provide a specific answer). 5–10 min.
- Addressing one spokesperson in the group at a time, every spokesperson in the circle repeats the requests made by him or her, then shares his or her responses (**yes, no, I will try, or whatever**). No discussion! No elaboration! 10 min.
- Debrief with **What, So What, Now What?** 15 min.

WHY? Purposes

- Learn how to articulate functional and/or personal needs clearly
- Practice asking for what functions and/or individuals need
- Learn how to give clear answers to requests
- Reestablish and/or improve communication inside functional clusters
- Make progress across functional silos
- Mend connections that have been broken
- Get all the issues out on the table at the same time for everyone to see
- Reduce frustration by eliminating preconceptions and rumors
- Build trust so that group members can share accountability with integrity

Tips and Traps

- Remind participants that a whatever response means their request was too vague to provide a specific answer
- Strictly enforce the “no immediate response” rule
- Strictly enforce the rule that the only responses are yes, no, I will try, or whatever (no further elaboration is allowed)
- Encourage everyone to ask for what they truly need to be successful
- Have fun and encourage a safe amount of drama
- In debriefing, try to draw out that people are good at complaining and not so good at asking for what they need. WINFY helps you move from complaints to valid requests.
- Use question-and-response cards to help groups sharpen how they express their requests

Riffs and Variations

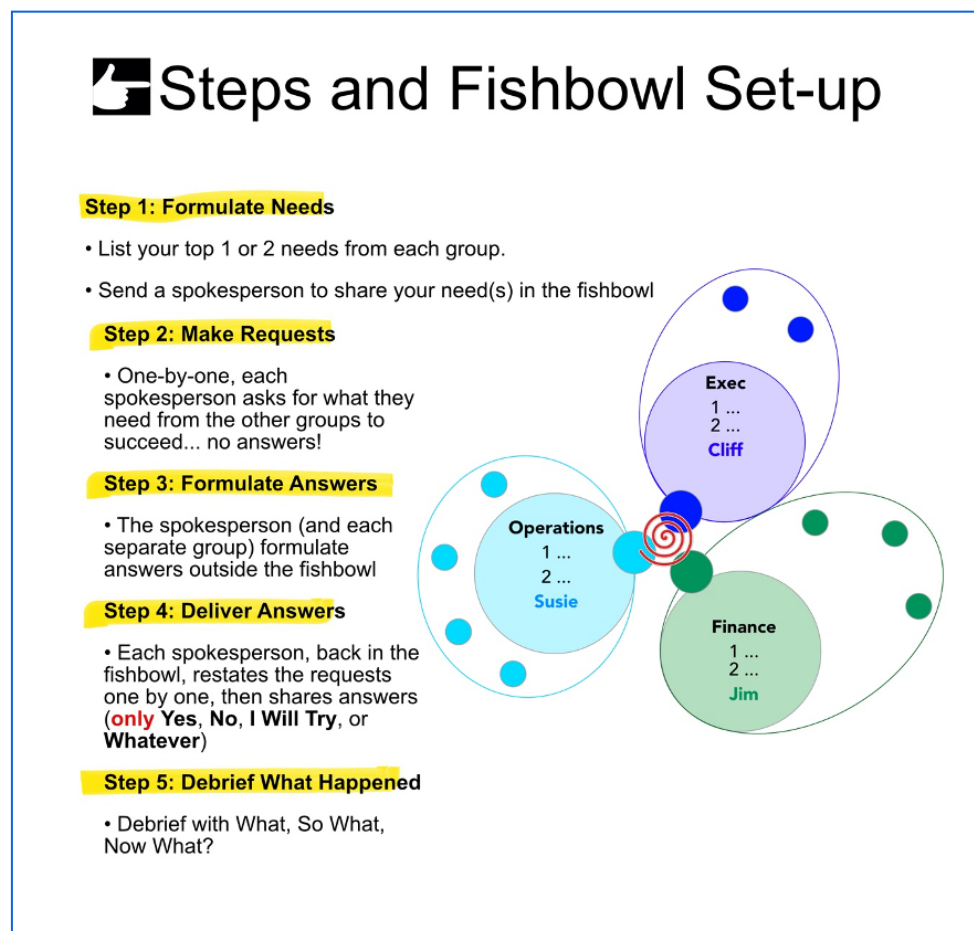
- Consider a second round if too much appears to be unresolved or unclear: making concrete and clear requests is an essential skill!
- In the debrief, give participants a chance to articulate what was not asked of them: something neglected that would help achieve the groups' purpose but was not requested
- Instead of functional clusters, use the same **WINFY** sequence with a group or a team of individuals who are interdependent

Examples

- For a global technical group (with members in multiple countries) facing the need to make decisions in a fast-changing market.
- For three top executives who are struggling to give consistent direction to the next level of leaders in the organization
- For hospital executives and managers launching a patient-centered care initiative that requires multi-specialty collaboration
- For helping one-on-one relationships become more generative

Collateral Material

Below: Presentation material we use to introduce WINFY



4.- Troika Consulting

Get Practical and Imaginative Help from Colleagues Immediately (30 min.)

To listen is very hard, because it asks of us so much interior stability that we no longer need to prove ourselves by speeches, arguments, statements or declarations. True listeners no longer have an inner need to make their presence known. They are free to receive, welcome, to accept. – Henri Nouwen

What is made possible?

You can help people gain insight on issues they face and unleash local wisdom for addressing them. In quick round-robin “consultations,” individuals ask for help and get advice immediately from two others. Peer-to-peer coaching helps with discovering everyday solutions, revealing patterns, and refining prototypes. This is a simple and effective way to extend coaching support for individuals beyond formal reporting relationships. Troika Consulting is always there for the asking for any individual who wishes to get help from colleagues or friends.

Five Structural Elements – Min Specs

1. Structuring Invitation

- Invite the group to explore the questions “What is your challenge?” and “What kind of help do you need?”

2. How Space Is Arranged and Materials Needed

- Any number of small groups of 3 chairs, knee-to-knee seating preferred. No table!

3. How Participation Is Distributed

- In each round, one participant is the “client,” the others “consultants”
- Everyone has an equal opportunity to receive and give coaching

4. How Groups Are Configured

- Groups of 3
- People with diverse backgrounds and perspectives are most helpful

5. Sequence of Steps and Time Allocation

- Invite participants to reflect on the consulting question (the challenge and the help needed) they plan to ask when they are the clients. 1 min.
- Groups have first client share his or her question. 1-2 min.
- Consultants ask the client clarifying questions. 1-2 min.
- Client turns around with his or her back facing the consultants
- Together, the consultants generate ideas, suggestions, coaching advice. 4-5 min.
- Client turns around and shares what was most valuable about the experience. 1-2 min.
- Groups switch to next person and repeat steps.

WHY? Purposes

- Refine skills in asking for help
- Learn to formulate problems and challenges clearly
- Refine listening and consulting skills
- Develop ability to work across disciplines and functional silos
- Build trust within a group through mutual support
- Build capacity to self-organize
- Create conditions for unimagined solutions to emerge

Tips and Traps

- Invite participants to form groups with mixed roles/functions
- Suggest that participants critique themselves when they fall into traps (e.g., like jumping to conclusions)
- Have the participants try to notice the pattern of support offered. The ideal is to respectfully provoke by telling the client “what you see that you think they do not see”
- Tell participants to take risks while maintaining empathy
- If the first round yields coaching that is not good enough, do a second round
- Beware that two rounds of 10 minutes per client is more effective than one round of 20 minutes per client.
- Keep the spaces safe: if you share anything, do it judiciously
- Questions that spark self-understanding or self-correction may be more powerful than advice about what to do
- Tell clients to try and stay focused on self-reflection by asking, “What is happening here? How am I experiencing what is happening?”
- Make Troika Consulting routine in meetings and conferences

Riffs and Variations

- Meld with 15% Solutions: each client shares a 15% Solution, asking for coaching
- Inviting the client to turn around and sit facing away from his or her consultants once the question has been shared and clarified deepens curiosity, listening, empathy, and risk taking for all. The alternative of not turning around is an option.
- Restrict the coaching to generating only questions to clarify the challenge: no advice giving (aka Q-Storming)

Examples

- For the beginning or end of staff meetings
- After a presentation, for giving participants time to formulate and sift next steps
- For students to help one another and to promote peer-to-peer learning

- In the midst of conferences and large-group meetings
- As a self-initiated practice within a group

Steps and Schedule

1. Form groups of three
2. 7-10 minutes per person
3. Spend 1-2 minutes sharing your action idea including 15% Solutions
4. Spend 5-7 minutes receiving feedback and advice from your consultants
5. For 1-2 minutes to thank the consultants
6. Switch to the next person, repeat the exercise



Steps and Schedule

1. Formulate Needs
2. 7-10 minutes per person
3. Spend 1-2 minutes sharing your action ideas (including 15% Solutions)
4. Spend 5-7 minutes receiving feedback and advice from your consultants
5. For 1-2 minutes, thank your consultants
6. Switch to the next person

5.- Eco-cycle Planning

Analyze the Full Portfolio of Activities and Relationships to Identify Obstacles and Opportunities for Progress (95 min.)

What is made possible?

You can eliminate or mitigate common bottlenecks that stifle performance by sifting your group's portfolio of activities, identifying which elements are starving for resources and which ones are rigid and hampering progress. The Ecocycle makes it possible to sift, prioritize, and plan actions with everyone involved in the activities at the same time, as opposed to the conventional way of doing it behind closed doors with a small group of people. Additionally, the Ecocycle helps everyone see the forest AND the trees—they see where their activities fit in the larger context with others. Ecocycle Planning invites leaders to focus also on creative destruction and renewal in addition to typical themes regarding growth or efficiency. The Ecocycle makes it possible to spur agility, resilience, and sustained performance by including all four phases of development in the planning process.

Five Structural Elements – Min Specs

1. Structuring Invitation

- Invite the group to view, organize, and prioritize current activities using four developmental phases: birth, maturity, creative destruction, and renewal
- Invite the group to formulate action steps linked to each phase: actions that accelerate growth during the birth phase, actions that extend life or increase efficiency during the maturity phase, actions that prune dead wood or compost rigid practices during the creative destruction phase, actions that connect creative people or prepare the ground for birth during the renewal phase. The leadership stance required for each phase can be characterized as entrepreneur, manager, heretic, and networker.

2. How Space Is Arranged and Materials Needed

- A room with an open flat wall and open space for participants to stand comfortably in front of the wall
- Chairs for people to sit in groups of 4, with or without small round tables
- A blank Ecocycle map worksheet for each participant and a large wall-poster version posted on the wall
- Post-it notes for each activity

3. How Participation Is Distributed

- Everybody involved in the work is included, all levels and functions
- Everyone has an equal opportunity to contribute

4. How Groups Are Configured

- 1-2-4-All
- Small groups for action steps

5. Sequence of Steps and Time Allocation

- Introduce the idea of the Ecocycle and hand out a blank map to each participant. 5 min.
- Ask participants to generate their individual activity lists: "For your working group (e.g., department, function, or whole company), make a list of all the activities (projects, initiatives) that occupy your time." 5 min.
- Ask them to work in pairs to decide the placement of every activity in the Ecocycle. 10 min.
- Invite them to form groups of four and finalize the placement of activities on the Ecocycle map. 15 min.
- Ask each group to put its activities on Post-it notes and create a whole-room map by inviting the groups one by one to place their Post-its on the larger map. 15 min.
- Ask each group to step back and digest the pattern of placements. Ask them to focus on all the activities on which there is consensus about their placement. Ask, "What activities do we need to creatively destroy or stop to move forward? What activities do we need to expand or start to move forward?" 15 min.
- In small groups, for each activity that needs to be stopped (activities that are in the Rigidity Trap), create a first-action step. 10 min. or more depending on the number of activities and groups.
- In small groups, for each activity that needs to start or get more resources (activities in the Poverty trap), create a first-action step. 10 min. or more as above.
- Ask all the groups to focus on all the activities for which there is no consensus. Do a quick round of conversation to make sense of the differences in placement. When possible, create first-action steps to handle each one. 10 min.

WHY? Purposes

- Set priorities
- Balance a portfolio of strategies
- Identify waste and opportunities to free up resources
- Bring and hear all perspectives at once
- Create resilience and absorb disruptions by reorganizing programs together
- To reveal the whole picture, the forest AND the trees

Tips and Traps

- Don't do your first Ecocycle Planning session with your group's entire portfolio of market strategies. Start with a simpler program, something tangible with shared experience.
- Remind participants that all phases of the Ecocycle must be parts of a healthy organization

- Be very clear on the domain or type of activities being considered—check activities to be sure they are on a similar scale and domain
- Include views from inside and outside the organization or function (diverse participants and clients can help)
- Preparations and explicit criteria for each quadrant may help or interfere
- Don't hesitate to do a second round
- Identifying the Rigidity and Poverty Traps, plus connecting specific activities with these labels, launches the search for solutions

Riffs and Variations

- Ask participants to make a list of all their important relationships with internal and external customers/suppliers (in addition to their activities) and to place them on the Ecocycle. Ask them to evaluate the relationships with the same questions used for the activities and to include them in the last four steps of the Ecocycle planning process. Highly recommended!
- String together with, 1-2-4-All, WINFY, and Open Space
- TRIZ can help to deepen the Creative Destruction quadrant
- Use with virtual groups by inviting participants to place their Ecocycle assessments with a dot on the whiteboard, then chat in pairs and with the whole group about the pattern that emerges. Before you enter into full-group placements, use silence and paired chat (1-2-All) to build understanding. You will need to agree on a short common list of activities or relationships to help simplify mapping. Number or letter each item and invite placements one by one. Sift and sort answers with a whiteboard and a person playing a “synthesizer” role. Don't worry about perfection in the first rounds. Virtual sessions can deepen or complement face-to-face exchanges.
- What, So What, Now What? and 25/10 Crowd Sourcing can help spur action

Examples

- For service portfolio review with an information technology department
- For nursing executives and academics transforming their approach to education (evaluating the history as well as proposed change initiatives)
- For planning changes in an individual's personal life, sifting through activities and shaping next steps
- For accelerating performance of an executive team in the midst of integrating a newly acquired company (sifting through a mixture of two product lines and research opportunities)

6.- 25/10 Crowd Sourcing

Analyze the Full Portfolio of Activities and Relationships to Identify Obstacles and Opportunities for Progress (95 min.)

Reality is only a consensual hunch. – Lily Tomlin

What is made possible?

You can help a large crowd generate and sort their bold ideas for action in 30 minutes or less! With 25/10 Crowd Sourcing, you can spread innovations “out and up” as everyone notices the patterns in what emerges. Though it is fun, fast, and casual, it is a serious and valid way to generate an uncensored set of bold ideas and then to tap the wisdom of the whole group to identify the top ten. Surprises are frequent!

Five Structural Elements – Min Specs

1. Structuring Invitation

- Invite participants to think big and bold and discover the most attractive of their ideas together by asking, “If you were ten times bolder, what big idea would you recommend? What first step would you take to get started?”

2. How Space Is Arranged and Materials Needed

- Open space without chairs or tables
- Participants will be standing and milling about
- Index cards, one for each participant

3. How Participation Is Distributed

- Everyone is included and participates at the same time
- Everyone has an equal opportunity to contribute

4. How Groups Are Configured

- Individually to generate bold idea and first step and write on index card
- Everyone standing to pass cards around
- Pairs to exchange thoughts
- Individually to score the card participants have in their hand
- Whole group for sharing highest final scores and ideas

5. Sequence of Steps and Time Allocation

- Explain the process. First, every participant writes on an index card his or her bold idea and first step. Then people mill around and cards are passed from person to person. “Mill and Pass only. No reading.” When the bell rings, people stop passing cards and pair up to exchange thoughts on the cards in their hands. [Another good option is to read the card with no talking]. Then participants individually rate the idea/step on their card with a score of 1 to 5 (1 for low and 5 for high) and write it on the back of the card. This is called “Read and Score.” When the bell rings, cards are passed around a second time “Mill and Pass” until the bell rings and the “Read and Score” scoring cycle repeats. This is done for a total of five scoring rounds. At the end of cycle five,

participants add the five scores on the back of the last card they are holding. Finally, the ideas with the top ten scores are identified and shared with the whole group. 3 min.

- Demonstrate one exchange-and-scoring interaction using a sample index card to clarify what is expected during the milling, namely no reading of the cards, only passing the cards from person to person so that each person has one and only one card in hand. The process can be confusing for some people. 2 min.
- Invite each participant to write a big idea and first step on his or her card. 5 min.
- Conduct five 3-minute exchange-and-scoring rounds with time for milling (and laughing) in between. 15 min.
- Ask participants to add the 5 scores on the back of the card they are holding
- Find the best-scoring ideas with the whole group by conducting a countdown. Ask, "Who has a 25?" Invite each participant, if any, holding a card scored 25 to read out the idea and action step. Continue with "Who has a 24?," "Who has a 23" Stop when the top ten ideas have been identified and shared. 5 min.
- End by asking, "What caught your attention about 25/10?" 2 min.

Live action rounds of 25/10 @ the **Liberating Lean LS workshop**. "Mill and pass," then "Read and Score + raise your hand when you are done scoring," then "Mill and Pass,"... "Read and score" repeated in five rounds.

WHY? Purposes

- Develop a group's ability to quickly tap their own very diverse sources of wisdom
- Obtain results that are more likely to endure because they were generated transparently from within and without imported advice
- Spark synergy among diverse views while building coherence
- Encourage novice innovators to think boldly and come up with practical first steps and testable hypotheses
- Create an environment in which good ideas and focused experiments can bubble up

Tips and Traps

- Some of the scoring may be erratic. If a participant at the end of round five has a card with more or less than five scores, ask the participant to calculate the average of the scores and multiply this average by 5.
- Invite the group to choose one big idea and first-action step and revise it so that it is expressed even more clearly and compellingly
- Suggest a seriously fun but clear rating scale, for example: 1 = not your cup of tea to 5 = sends me over the moon. The crowd needs to understand and agree with the rating system if it is to be used for decisions.

- As you start and demonstrate one exchange-and-scoring interaction, take your time and ask for feedback, particularly if it is a large group.
- To make it hard to peek at scoring from earlier rounds, cover the back of the card with a Post-it note
- Post all the cards on a wall or on tapestry paper, with the highest-scoring cards on the top

Riffs and Variations

- Move to developing action plans or to Open Space with your Top 10
- Give more scoring weight to ideas or experiments with testable hypotheses. What evidence would show your idea works? How will you test your idea?
- Do a second round of 25/10 Crowd Sourcing that includes others not in the present group
- Include 25/10 Crowd Sourcing at the beginning and end of a meeting
- Instead of asking for bold ideas, ask, "If you could unmake one decision that is holding you back, what would it be? What is your first step to unmake it?"
- Instead of bold ideas, ask, "What courageous conversation are you not having? What first step could spark your courage?"
- Instead of bold ideas, ask, "What do you hope can happen in the future? What practical first step can you take now to tip the balance in this direction?"

Examples

- For prioritizing ideas and galvanizing the community after an Open SpaceTechnology or "Unconference" (participant-driven) meeting
- For illuminating bold ideas at the start of a conference or task-force meeting
- For wrapping up an important meeting



7.- Making Space with TRIZ

Stop Counterproductive Activities and Behaviors to Make Space for Innovation (35 min.)

Every act of creation is first an act of destruction. – Pablo Picasso

What is made possible?

You can clear space for innovation by helping a group let go of what it knows (but rarely admits) limits its success and by inviting creative destruction. TRIZ makes it possible to challenge sacred cows safely and encourages heretical thinking. The question “What must we stop doing to make progress on our deepest purpose?” induces seriously fun yet very courageous conversations. Since laughter often erupts, issues that are otherwise taboo get a chance to be aired and confronted. With creative destruction come opportunities for renewal as local action and innovation rush in to fill the vacuum. Whoosh!

Five Structural Elements – Min Specs

1. Structuring Invitation

In this three-step process, ask:

- “Make a list of all you can do to make sure that you achieve the worst result imaginable with respect to your top strategy or objective.”
- “Go down this list item by item and ask yourselves, ‘Is there anything that we are currently doing that in any way, shape, or form resembles this item?’ Be brutally honest to make a second list of all your counterproductive activities/programs/procedures.”
- “Go through the items on your second list and decide what first steps will help you stop what you know creates undesirable results?”

2. How Space Is Arranged and Materials Needed

- Unlimited number of small groups of 4 to 7 chairs, with or without small tables
- Paper for participants to record

3. How Participation Is Distributed

- Everybody involved in the work is included
- Everyone has an equal opportunity to contribute

4. How Groups Are Configured

- Groups with 4 to 7 participants
- Established teams or mixed groups

5. Sequence of Steps and Time Allocation

- After introduction, three segments, 10 minutes for each segment
- Introduce the idea of TRIZ and identify an unwanted result. If needed, have the groups brainstorm and pick the most unwanted result. 5 min.

- Each group uses 1-2-4-All to make a first list of all it can do to make sure that it achieves this most unwanted result. 10 min.
- Each group uses 1-2-4-All to make a second list of all that it is currently doing that resembles items on their first list. 10 min.
- Each group uses 1-2-4-All to determine for each item on its second list what first steps will help it stop this unwanted activity/program/procedure. 10 min.

WHY? Purposes

- Make it possible to speak the unspeakable and get skeletons out of the closet
- Make space for innovation
- Lay the ground for creative destruction by doing the hard work in a fun way
- TRIZ may be used before or in place of visioning sessions
- Build trust by acting all together to remove barriers

Tips and Traps

- Enter into TRIZ with a spirit of serious fun
- Don't accept ideas for doing something new or additional: be sure suggestions are about stopping activities or behaviors, not about starting new things. It is worth the wait.
- Begin with a VERY unwanted result, quickly confirm your suggestion with the group
- Check in with groups that are laughing hard or look confused
- Take time for groups to identify similarities to what they are doing now and explore how this is harmful
- Include the people that will be involved in stopping the activities that come out and ask, "Who else needs to be included?"
- Make real decisions about what will be stopped (number your decisions 1,2,3...) in the form of "I will stop" and "we will stop."

Riffs and Variations

- Go deeper with a second or third round to refine or deepen understanding of unwanted results.
- Link these results (creative destruction) to a broad review of activities via Ecocycle Planning.
- Share action steps: then go deeper and string together with Troika Consulting, or Open Space.

Examples

- For reducing harm to patients experiencing safety lapses (e.g., wrong-side surgery, patient falls, medication errors, iatrogenic infections) with cross-functional groups: "How can we make sure we always operate on the wrong side?"

- For helping institutional leaders notice how it is they inadvertently exclude diverse voices: "How can we devise policies and practices that only work for a select few?"
- For IT professionals: "How can we make sure we build an IT system that no one will want to use?"
- For leadership groups: "How can we make sure we keep doing the same things with the same people while asking for different results?"

STEPS & SCHEDULE

Step one:

- First Alone, then in your small group, compile a list of to-do's in answer to:
- How can I/we reliably create_____ (a very unwanted result of your work together)
- 10minutes
- Go wild

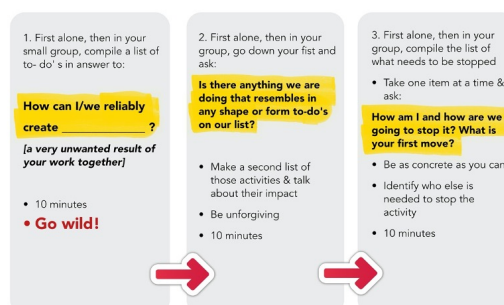
Step two:

- First Alone, then in your small group, go down on your list and ask
- Is there anything we are doing that resembles in any, shape or form to-do's on our list)
- Make a second list of those activities and talk about their impact.
- Be unforgiving
- 10 minutes

Step three:

- First Alone, then in your group, compile the list of what need to be stopped
- Take one item at a time and ask
- How am I and how are we to stop it? What is your first move?
- Be concrete as you can
- Identify who else is needed to stop the activity
- 10 minutes

Steps and Schedule



8.- Improptu Networking

Rapidly Share Challenges and Expectations, Build New Connections (20 min.)

What is made possible?

You can tap a deep well of curiosity and talent by helping a group focus attention on problems they want to solve. A productive pattern of engagement is established if used at the beginning of a working session. Loose yet powerful connections are formed in 20 minutes by asking engaging questions. Everyone contributes to shaping the work, noticing patterns together, and discovering local solutions.

Five Structural Elements – Min Specs

1. Structuring Invitation

- Ask, “What big challenge do you bring to this gathering? What do you hope to get from and give this group or community?”

2. How Space Is Arranged and Materials Needed

- Open space without obstructions so participants can stand in pairs and mill about to find partners

3. How Participation Is Distributed

- Everybody at once with the same amount of time (no limit on group size)
- Everyone has an equal opportunity to contribute

4. How Groups Are Configured

- Pairs
- Invite people to find strangers or colleagues in groups/functions different from their own

5. Sequence of Steps and Time Allocation

- In each round, 2 minutes per person to answer the questions. 4-5 min. per round
- Three rounds

WHY? Purposes

- Initiate participation immediately for everyone provided the questions are engaging
- Attract deeper engagement around challenges
- Invite stories to deepen as they are repeated
- Help shy people warm up
- Affirm individual contributions to solutions
- Emphasize the power of loose and new connections
- Suggest that little things can make a big difference

Tips and Traps

- Use one challenge question and one give-and-take question
- Ask questions that invite participants to shape the direction of their work together
- Use Impromptu Networking before you begin meetings and conferences
- Use bells (e.g., tingsha) to help you shift participants from first, to second, to third rounds
- Ask questions that are open-ended but not too broad
- Invite serious play
- Have three rounds, not one or two

Riffs and Variations

- Play with different questions: What problem are you trying to solve? What challenge lingers from our last meeting? What hunch are you trying to confirm?
- Taking a group outside a meeting room increases the fun factor
- Link to Social Network Webbing
- Invite participants to make a simple plan to follow up via 15% Solutions
- Make it faster depending on your schedule
- Invite each person, in their pair, to finish these open sentences in 1 minute or less: If only.... They make me... I have to... that's just the way it is. If they would ____ then I could _____!

Examples

- For sparking deeper connections on the first day of class, college professors have asked their students, "Why did you choose to attend this class? What do you want to learn from and offer to members of this class?"
- For jump-starting a cross-functional, interdisciplinary learning session,"



9.- Tiny Demons

Invitation

Make a list of your biggest fears, doubts or anxieties (at least 4) related to navigating conflict in teams

Material

- Empty piece of paper

Steps

- (2 min) Individually, create a list of the fears, doubts or anxieties you have in relation to your purpose. Encourage people to really make a list;
- (2 min) Invite participants to create four quadrants on an empty piece of paper or use the notebook. Invite participants to create drawings in each quadrant:
- Top-left corner: a squiggly line
- Top-right corner: a closed shape
- Bottom-left corner: a line
- Bottom-right corner: Go wild!
- (3 min) Invite participants to turn each of their shapes into monsters by adding eyes, tails, fins, teeth, ears, horns, wings, blood, etc. Encourage people to have fun with this;
- (3 min) Invite participants to pick four fears and associate each of them with one of the monsters. Encourage participants to give the monsters a name. Again, encourage people to have fun with this;
- (4 min) Invite participants to pick the one monster they want to befriend or see differently - that if they could, would make a big difference. Have them re-draw that demon dancing. Add a party hat, a fake nose, music, drinks, hot dance moves, etc;
- (4 min) Invite participants to briefly share their demons with their neighbor
- Create the Tiny Demons Gallery
- Debrief
- (2 min) What do you notice?

10.- 15% Solutions

Discover and Focus on What Each Person Has the Freedom and Resources to Do
Now (20 min.)

You cannot cross the sea merely by standing and staring at the water. – R. Tagore

What is made possible?

You can reveal the actions, however small, that everyone can do immediately. At a minimum, these will create momentum, and that may make a BIG difference. 15% Solutions show that there is no reason to wait around, feel powerless, or fearful. They help people pick it up a level. They get individuals and the group to focus on what is within their discretion instead of what they cannot change. With a very simple question, you can flip the conversation to what can be done and find solutions to big problems that are often distributed widely in places not known in advance. Shifting a few grains of sand may trigger a landslide and change the whole landscape.

Five Structural Elements – Min Specs

1. Structuring Invitation

- In connection with their personal challenge or their group's challenge, ask, "What is your 15 percent? Where do you have discretion and freedom to act? What can you do without more resources or authority?"

2. How Space Is Arranged and Materials Needed

- Unlimited number of groups.
- Chairs for people to sit in groups of 2-4; no tables required.

3. How Participation Is Distributed

- Everyone is included
- Everyone has an equal opportunity to contribute

4. How Groups Are Configured

- First alone
- Then in pairs or small groups

5. Sequence of Steps and Time Allocation

- First alone, each person generates his or her own list of 15% Solutions. 5 min.
- Individuals share their ideas with a small group (2 to 4 members). 3 min. per person and one person at a time
- Group members provide a consultation to one another (asking clarifying questions and offering advice). 5 to 7 min. per person and one person at a time

WHY? Purposes

- Move away from blockage, negativism, and powerlessness
- Have people discover their individual and collective power
- Reveal bottom-up solutions
- Share actionable ideas and help one another

- Build trust
- Remember unused capacity and resources (15 percent is always there for the taking)
- Reduce waste
- Close the knowing-doing gap

Tips and Traps

- Check each item to assure that it is within the discretion of the individual
- Be ready for BIG things to emerge via the butterfly effect
- Reinventing the wheel is OK
- Each 15% Solution adds to understanding of what is possible
- Clear, common purpose and boundaries will generate coherence among many 15% Solutions
- Make it a routine to ask for 15% Solutions in meetings (15% Solutions are otherwise commonly unnoticed and overlooked)
- While introducing the idea, tell a story about a small change made by an individual that sparked a big result
- Learn more from professor Gareth Morgan, who has popularized the concept at www.imaginiz.com/index.html under the tab Provocative Ideas

Riffs and Variations

- Natural fit with Troika Consulting, Open Space
- Returning to a group, you can ask, "What have you done with your 15 percent lately?"
- Examples
- For any problem-solving or planning activity in which you want individuals to take initiative
- For inclusion in the conveners report in Open Space sessions
- For any challenge that requires many people to change for success to emerge
- For generating small "chunks" of success that can be combined into a simple prototype that is easy and cheap to test (low-fidelity prototype)

11.- OPEN SPACES

Liberate Inherent Action and Leadership in Groups of Any Size (90 min. and up to 3 days)

One day a student asked, “What is the most difficult part of painting?” The master answered, “The part of paper where nothing is painted is the most difficult.” – Painting Zen

What is made possible?

When people must tackle a common complex challenge, you can release their inherent creativity and leadership as well as their capacity to self-organize. Open Space makes it possible to include everybody in constructing agendas and addressing issues that are important to them. Having co-created the agenda and free to follow their passion, people will take responsibility very quickly for solving problems and moving into action. Letting go of central control (i.e., the agenda and assignments) and putting it in the hands of all the participants generates commitment, action, innovation, and follow-through. You can use Open Space with groups as large as a couple of thousand people!

Five Structural Elements – Min Specs

1. Structuring Invitation

- Invite people to come and address a complex problem
- Invite participants to co-construct the agenda by posting sessions that they will convene on topics they are passionate about
- Invite participants to join any session that they care about

2. How Space Is Arranged and Materials Needed

- Chairs in concentric circles for 10–1,000 people in a large room or open space
- Microphones needed for groups larger than 40
- Large blank agenda posted on easels and flip charts, long tapestry paper, or whiteboard
- Agenda to include slots for enough concurrent sessions to accommodate what is likely to emerge given the challenge and the number of participants. (One rule of thumb is that 3 out of 10 participants will post a session, e.g., there will be 15 sessions posted from 50 participants.)

3. How Participation Is Distributed

- Everyone who cares about the challenge at hand and accepts the organizers' invitation is included
- Everyone has an equal opportunity to contribute
- The “Law of Two Feet” governs the participation of all attendees in the various sessions. It says: “Go and attend whichever session you want, but if you find yourself in a session where you are not learning or contributing, use your two feet!”

4. How Groups Are Configured

- Start together in one large circle (or as many concentric circles as needed)
- Continue with groups of various sizes self-organized around agenda topics

5. Sequence of Steps and Time Allocation

WHY? Purposes

- Generate action and build energy, commitment, and shared leadership
- Address intractable problems or conflicts by unleashing self-organization
- Make sure that ALL of the issues that are most important to the participants are raised, included in the agenda, and addressed
- Make it possible for participants to take responsibility for tackling the issues that they care about and for what does or doesn't happen

Tips and Traps

- To get started, we recommend reading *Open Space Technology: A User's Guide* by the founder of Open Space, Harrison Owen. All the elements to try Open Space for the first time are included and described very clearly.
- A compelling challenge and attractive invitation are key requirements.
- Write up the entire proceedings in a single document, completed and distributed/shared immediately during the meeting.
- The facilitator should introduce the Law of Two Feet, Four Principles, and the mechanics of Open Space in a seriously entertaining fashion.
- As the facilitator, notice when you form a judgment (about what is right or wrong) or an idea about how you can help, then "let it go": do one less thing!
- A meeting without the Law of Two Feet—namely, one where the agenda is created by the participants but people are not free to attend the session of their choice—is NOT Open Space!

Riffs and Variations

- Reopen the Marketplace a second time each morning (bigger collaborations may emerge)
- Other forms of Open Space are called unconferences and BarCamps.

Examples

- For management meetings of all stripes
- Read "Turning a Business Around" in Part Three: Stories from the Field. Alison Joslyn launched a business transformation by inviting all employees to a three-day Open Space meeting.
- Immediately after a merger, for bringing together all the employees of both companies to shape next steps and take action together.
- To share IT innovation prototypes and unleash collaborative action among widely distributed grantees.

12.- User Experience Fishbowl

Share Know-How Gained from Experience with a Larger Community (35-70 min.)

What is made possible?

A subset of people with direct field experience can quickly foster understanding, spark creativity, and facilitate adoption of new practices among members of a larger community. Fishbowl sessions have a small inside circle of people surrounded by a larger outside circle of participants. The inside group is formed with people who made concrete progress on a challenge of interest to those in the outside circle. The fishbowl design makes it easy for people in the inside circle to illuminate what they have done by sharing experiences while in conversation with each other. The informality breaks down the barriers with direct communication between the two groups of people and facilitates questions and answers flowing back and forth. This creates the best conditions for people to learn from each other by discovering answers to their concerns themselves within the context of their working groups. You can stop imposing someone else's practices!

Five Structural Elements – Min Specs

1. Structuring Invitation

- Ask those in the fishbowl to describe their experience—the good, the bad, and the ugly—informally, concretely, and openly. Invite them to do it in conversation with each other as if the audience wasn't there and they were sharing stories around a watering hole or stuck in a van on the way to the airport. Firmly, ask them to avoid presenting to the audience.
- Invite the people outside the fishbowl to listen, observe nonverbal exchanges, and formulate questions within their small groups.

2. How Space Is Arranged and Materials Needed

- Three to 7 chairs in a circle in the middle of a room
- Microphones for inner circle if whole group is larger than 30 to 40
- If possible, a low stage or bar stools make it possible for people in the outer circle to better see the interactions
- As many chairs as needed in an outer circle around the inner circle, in clumps of 3 to 4 chairs
- In large groups, have additional microphones ready for outside circle questions

3. How Participation Is Distributed

- Everyone in the inner circle has an equal opportunity to contribute
- Everyone in the outer circle has an equal opportunity to ask questions

4. How Groups Are Configured

- One inner circle group of 3–7 people
- One outer circle in multiple small satellite groups of 3–4 people
- 1-2-4-All configuration for the debrief

5. Sequence of Steps and Time Allocation

- Explain the fishbowl configuration and steps. 2 min.
- Inner circle conversation goes on until it ends on its own. 10 to 25 min.
- Satellite groups in outer circle formulate observations and questions. 4 min.
- Questions submitted to the inner circle are answered, and back-and-forth interaction between inner and outer circles goes on as needed until all the questions are answered. 10 to 25 min.
- Debrief using W³ (What? So What? Now What?) and ask, "What seems possible now?" 10 to 15 min.

WHY? Purposes

- Get down-to-earth field experience and all the questions and answers about new endeavors out on the table for everyone to understand at the same time
- Create conditions for new ideas to emerge
- Make space for every participant's imagination and experience to show up
- Build skills in listening, storytelling, pattern-finding, questioning, and observing
- Celebrate early adopters and innovators who have gained field experience (often failing forward and vetting the prototype)

Tips and Traps

- For inner circle, pick only people with direct personal experience (without regard to rank)
- Pick people for the fishbowl (inner circle) who are representative of the distinct roles and functions that require coordination for success
- Encourage inner-circle people to share concrete, very descriptive examples rather than opinions
- Advise inner-circle people to imagine being in a car or a bar sharing stories and having a conversation
- Encourage everyone to share both successes and failures, "the good, the bad, the ugly"
- Enforce the "no speeches" and "talk to each other, not to the outer circle" rules!
- Collect ALL the questions from the outside circle before the "fish" restart their conversation
- Based on the overall pattern of questions, give the "fish" a choice of which questions to address
- Have fun and encourage animated storytelling

Riffs and Variations

- Leave an open chair in the inner circle for someone with experience to unexpectedly jump in

- With virtual groups, people in the outside circle use the chat function to share questions “to all” or in “pairs” as the conversation unfolds among “the fishes of the inner circle.”
- Inner and outer circles in full swing. In small groups, the outer circle generates BIG questions to dig deeper into the challenge. “What questions, if answered or addressed, would help up move forward?”.

Examples

- For transferring on-the-ground knowledge from officers returning from Afghanistan to those replacing them (see “Transforming After-Action Reviews in the Army” in Part Three: Stories from the Field).
- During a Liberating Structures workshop, a few experienced practitioners share stories to deepen the understanding of new users about how to get started and how to get practical results
- During a doctors’ meeting, an inner circle of specialists discussed a challenging case in the middle of a group of primary-care physicians, sparking a discussion of the case from specialist and primary-care perspectives
- A pilot group of salespeople shared with the rest of the sales force their experience with a new handheld reporting device. The User Experience Fishbowl helped everybody become comfortable that they knew all they needed to know to adopt the innovation.
- For a public-sector organization trying to expand beyond “hidden” pockets of uplifting service
- Members of an executive management team conducted their meeting in a fishbowl surrounded by all their managers.



13.- What?, So What?, Now What? W³

Together, Look Back on Progress to Date and Decide What Adjustments Are Needed (45 min.)

What is made possible?

You can help groups reflect on a shared experience in a way that builds understanding and spurs coordinated action while avoiding unproductive conflict. It is possible for every voice to be heard while simultaneously sifting for insights and shaping new direction. Progressing in stages makes this practical—from collecting facts about What Happened to making sense of these facts with So What and finally to what actions logically follow with Now What. The shared progression eliminates most of the misunderstandings that otherwise fuel disagreements about what to do. Voila!

Five Structural Elements – Min Specs

1. Structuring Invitation

- After a shared experience, ask, “WHAT? What happened? What did you notice, what facts or observations stood out?” Then, after all the salient observations have been collected, ask, “SO WHAT? Why is that important? What patterns or conclusions are emerging? What hypotheses can you make?” Then, after the sense making is over, ask, “NOW WHAT? What actions make sense?”

2. How Space Is Arranged and Materials Needed

- Unlimited number of groups
- Chairs for people to sit in small groups of 5-7; small tables are optional
- Paper to make lists
- Flip chart may be needed with a large group to collect answers
- Talking object * (optional)

3. How Participation Is Distributed

- Everyone is included
- Everyone has an equal opportunity to contribute at each table
- Small groups are more likely to give voice to everyone if one person facilitates and keeps everybody working on one question at a time

4. How Groups Are Configured

- Individuals
- Groups of 5-7
- Whole group
- Groups can be established teams or mixed groups

5. Sequence of Steps and Time Allocation

- If needed, describe the sequence of steps and show the Ladder of Inference (see below). If the group is 10–12 people or smaller, conduct the debrief with the whole group. Otherwise, break the group into small groups.

- First stage: WHAT? Individuals work 1 min. alone on “What happened? What did you notice, what facts or observations stood out?” then 2–7 min. in small group. 3–8 min. total.
- Salient facts from small groups are shared with the whole group and collected. 2–3 min.
- If needed, remind participants about what is included in the SO WHAT? question.
- Second stage: SO WHAT? People work 1 min alone on “Why is that important? What patterns or conclusions are emerging? What hypotheses can I/we make?” then 2–7 min. in small group. 3–8 min. total.
- Salient patterns, hypotheses, and conclusions from small groups are shared with the whole group and collected. 2–5 min.
- Third stage: NOW WHAT? Participants work 1 min. alone on “Now what? What actions make sense?” then 2–7 min. in small group. 3–8 min. total.
- Actions are shared with the whole group, discussed, and collected. Additional insights are invited. 2–10 min.

WHY? Purposes

Build shared understanding of how people develop different perspectives, ideas, and rationales for actions and decisions

Make sure that learning is generated from shared experiences: no feedback = no learning

Avoid repeating the same mistakes or dysfunctions over and over

Avoid arguments about actions based on lack of clarity about facts or their interpretation

Eliminate the tendency to jump prematurely to action, leaving people behind

Get all the data and observations out on the table first thing for everyone to start on the same page

Honor the history and the novelty of what is unfolding

Build trust and reduce fear by learning together at each step of a shared experience

Make sense of complex challenges in a way that unleashes action

Experience how questions are more powerful than answers because they invite active exploration

Tips and Traps

- Practice, practice, practice ... then What, So What, Now What? will feel like breathing
- Check with small groups to clarify appropriate answers to each question (some groups get confused about what fits in each category) and share examples of answers with the whole group if needed

- Note that the expression of emotions can be observed as a "What" (e.g., "many people were smiling and laughing" rather than suggesting people were "happy")
- When sharing with the whole group, collect one important answer at a time. Don't try to collect answers from each group or invite a long repetitive list from a single group. Seek out unique answers that are full of meaning.
- Intervene quickly and clearly when someone jumps up the Ladder of Inference
- Don't jump over the So What? stage too quickly. It can be challenging for people to link observations directly to patterns. It is the most difficult of the three Whats. Use the Ladder of Inference as a reminder of the logical steps "up the ladder" from observations to action.
- Appreciate candid feedback and recognize it
- Build in time for the debrief—don't trivialize it, don't rush it
- Make it the norm to debrief with W3, however quickly, at the end of everything
- Riffs and Variations
- Use a talking object for each round. It slows and deepens the productivity of W3
- For the What? question, spend time sifting items that arise into categories. For example, facts with evidence (e.g., every person in the group spoke) and feelings (e.g., I felt joy, people in my group were smiling and laughing, I moved through despair into hopefulness)
- Add a What If? question between So What? and Now What?
- For the So What? Question, sift items into patterns, conclusions, hypotheses/educated guesses, beliefs
- Invite a small group of volunteers to debrief in front of the whole room. People with strong reactions and diverse roles should be invited to join in.

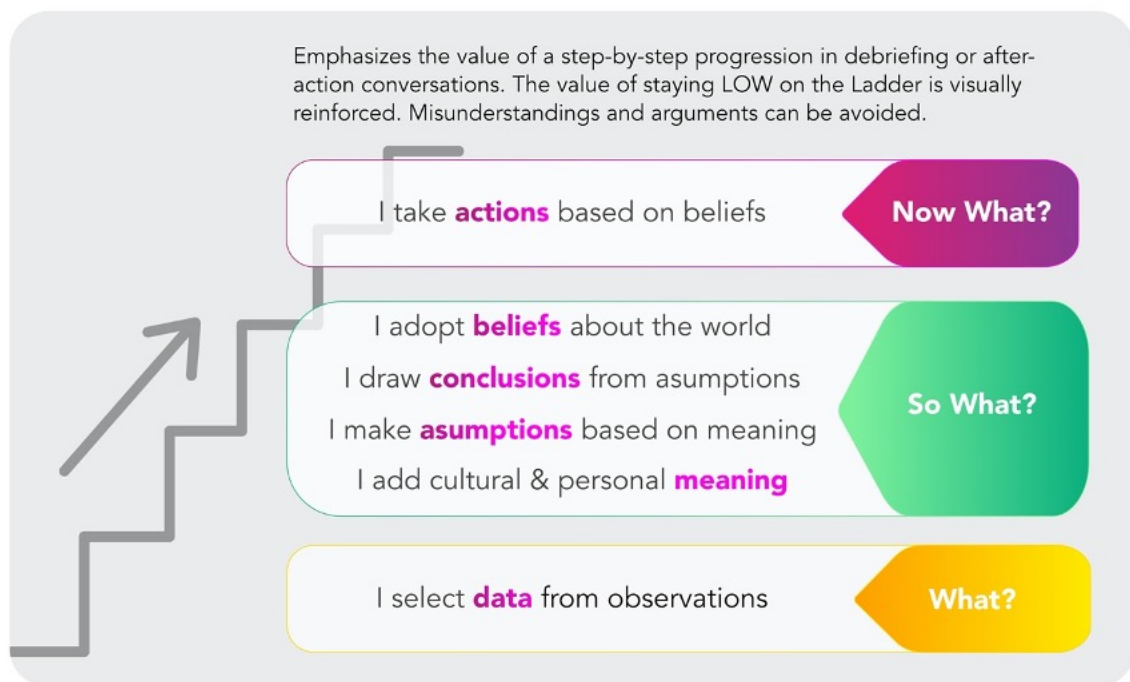
Examples

- For drawing out the history and meaning of the events prior to your gathering, start a meeting with W³
- For debriefing any meeting topic that generates complex or controversial responses
- For groups with people who have strong opinions or individuals who dominate the conversation
- For groups with people who have difficulty listening to others with different backgrounds
- For use in place of a leader "telling" people what to think, what conclusions to draw, or what actions to take (often unintentionally)
- As a standard discipline at the end of all meetings
- Right after a shocking event

- For providing feedback in academic settings (e.g., feedback from students to teachers)

More on talking objects: a taking object can be anything you are able to pass from one person to another. When you have it, you are invited to speak. When you don't, you are invited to listen. Natural objects that are enjoyable to hold in your hands. Playful art objects can also help lighten the mood for very serious topics. In a pinch, a book or pen will serve.

Ladder of Inference



Summary

Liberating Structures (LS) are simple rules that allow each voice to be included and build the future. The LS repertoire consists of a set of practical methods that are so versatile that anyone can use them for various activities and challenges. None of them require special training. Seeing them in action once is enough for many beginners to get results and adapt them in other areas. LS is designed to involve and engage everyone in an intergenerational work environment. In a sense, they rely on everyone's contribution to the group's success. Interaction and collaboration with others often determine success at work and in other areas of life. For the GSmart target group, we teach the basics of LS, its main advantages and benefits, and how it can be used for cross-generational collaboration. We also show the possibilities of its practical application based on the results of the GSmart project on cross-generational collaboration. Research shows that cross-generational collaboration differs between the older generation-BB- and the younger generation. In generations X, Y, and Z, intergenerational change in attitude, teamwork skills, trust, openness to experience, composure, friendliness, and honesty must be specifically encouraged and reinforced to enable cross-generational cooperation.

In addition, the most important element of cross-generational cooperation is the exchange of knowledge and experience, which complements the mutual skills of employees of different ages in the performance of their job functions and tasks. Age-related stereotypes and prejudices in the workplace are among the most frequently mentioned difficulties in dealing with generations. The seniors interviewed see the positive aspects of intergenerational cooperation in exchanging knowledge and experience, acquiring new skills, mutual learning, and helping in solving tasks, problems, or crises. Therefore, every company, institution, or organization needs a human resource management strategy and training on intergenerational diversity management to improve the work processes of different age groups. This workshop, therefore, provides a series of practical exercises for high-level organizations to improve and develop the skills of their educators and other staff supporting adult learners. At the end of the workshop, the project target groups will use the LS tools to overcome cross-generational collaboration issues. The working environment and the quality of life promoters for older people will be considered. The Liberating Structure method is adapted to the development of an organization and a community to manage generational diversity. The workshop consists of thirteen training activities in a series of simple microstructures. Individuals and groups can choose what works for them and what does not, then mix and match them flexibly to their challenges. It includes several hands-on activities to raise awareness of intergenerational cooperation, called BB, X, Y, and Z. All of the activities are grouped into one packet. Teachers are encouraged to read and understand the concept. For more information, see References and Resources at the end of the workshop.

Self-assessment test

References and resources

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