

INVITING

IMPLEMENTING

STRUCTURING

THE CHAORDIC STEPPING STONES

A planning tool
for designing
participatory
processes

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June 2016

WORKING IN THE CHAORDIC SPACE

The term “chaordic” comes from combining the words “chaos” and “order.” It is a word coined by Dee Hock to identify organizations that intentionally blend characteristic of chaos and order. In this document, we use this term to indicate that we are working in a space of complexity, where there is much that is unpredictable and unknown.

Our job as people who are hosting strategic work in this space - whether it is a conversation, a meeting or a longer term strategic initiative - is to bring some form and order to the

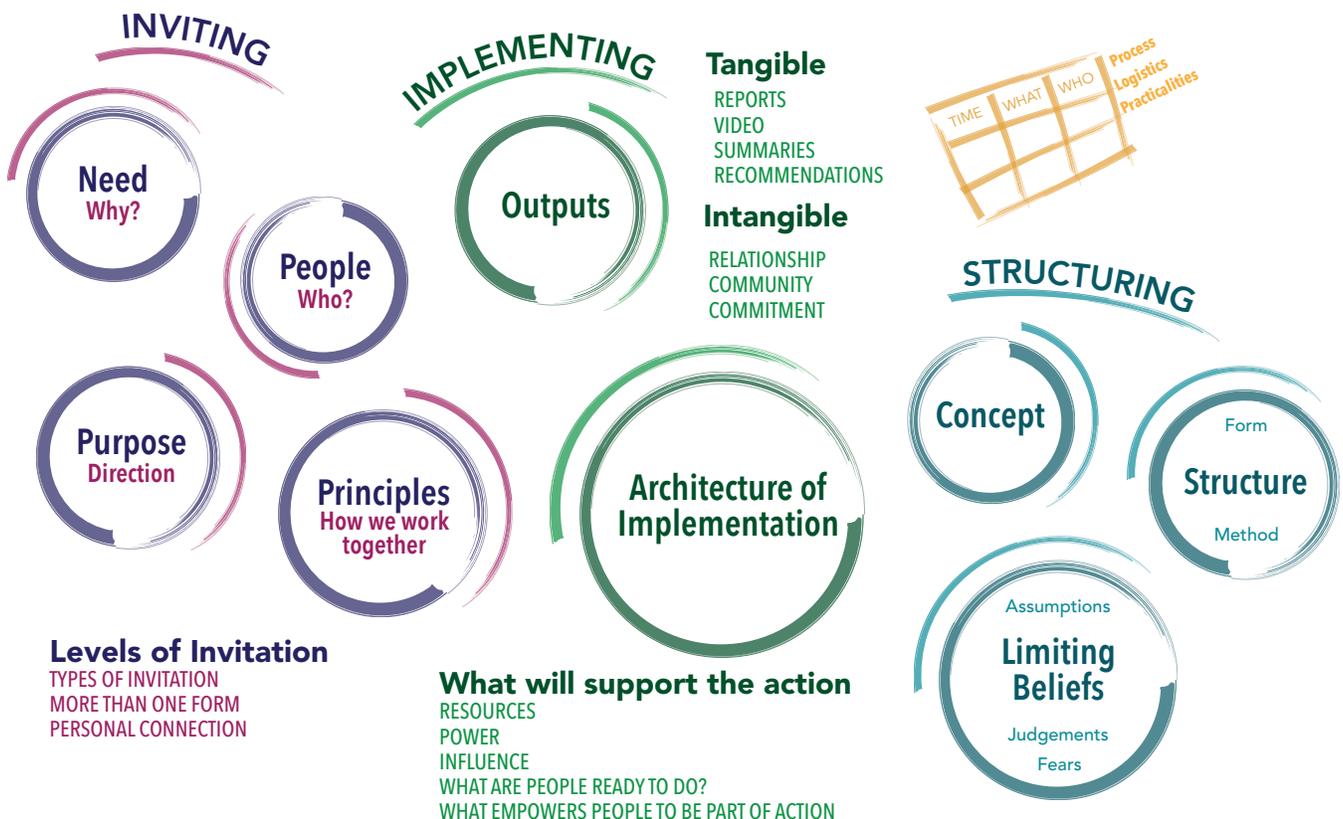
unpredictability while letting the emergent properties of complex systems bring us new ideas, insight and innovation. This is difficult to do without a road map, and the chaordic stepping stones provide both a guide path and a set of lenses to plan and reflect on this work.

This tool can be used by callers - those who see that there is work to be done in the world - in order to get their thinking straight and create good containers for planning and action. It can also be used by core teams that come together around a strategic need and purpose, to continually refine their design for their work.

The tool is designed to be used collectively, structured around a series of questions that can be answered by a group. Participatory processes require participatory leadership and these

CHAORDIC STEPPING STONES

Planning in Complexity



question will help you guide your planning to get the most out of a group.

The tool can be used sequentially to plan out a project and it can be used as a reflective tool to review and refine the work.

Designing Meetings and Processes

In designing a meeting or a process, each of these stepping stones is activated by asking key questions. In beginning to design work together we can select from these questions (or create others) to help us explore each stone as we lay it in place.

In this document we have given you a basic definition of the stepping stone, some sample questions to help guide your design and some ideas about how and what to harvest. These steps will lead you through three phases of strategic work and are applicable whether you are planning a single meeting or engaging in a multi-year strategic process. The three phases are:

- Inviting
- Implementing
- Structuring

INVITING

Participatory processes, whether single meetings or long term strategic interventions, require a solid invitation in order for people to show up and contribute. Because participatory processes are still a relatively unorthodox way of meeting and tackling strategic issues, invitations need to be participatory too, and they must unfold over time, inviting people specifically and in a way that engages them long before the meeting

begins. The saying “The conversation begins long before the meeting starts” should guide the way you plan an invitation. It is both content and process.

The first four stepping stones are most useful in beginning the invitation process.

Need

“This is no time to engage in the luxury of cooling off or to take the tranquilizing drug of gradualism.” - Martin Luther King

The need is the compelling and present reason for doing anything. Identifying the need helps to anchor an invitation. Sensing the need is the first step to designing a meeting, organizational structure or change initiative that is relevant. Needs can be identified in a number of ways through research, dialogue, large meetings or individual sensing interviews.

Context is important.

- What is going on in the world right now that makes our work important?
- What are the challenges and opportunities we are facing?
- Why is it important that we do this work?

Harvest:

- A needs statement for the project.
- A shared understanding about why it is important to do work now.
- A clear statement of urgency or timing with which to create an invitation

Purpose

“Purpose is the invisible leader” - Mary Follett Parker

Purpose statements are clear and compelling ideas about where we are going that guide us in doing our best possible work. Discerning a

shared purpose is helpful to guide work and seek outcomes, but don't get too attached. Working in a chaordic space means constantly making adjustments as you learn and create new ideas and solutions. A purpose statement should be a direction, not a necessarily a destination.

Once you have a purpose statement, continue to check in to make sure it is valid and true. Adjust it if you need to based on what you're learning as you go.

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

Harvest:

- A common understanding of the basic direction for the work
- Commitment and buy in to a direction and intention for the work
- A clear statement of purpose around which to build an invitation

Principles

"Obey the principles without being bound by them" - Bruce Lee

Principles of cooperation help us to know how we will work together. It is very important that these principles be simple, co-owned and well understood. These are not principles that are platitudes or that lie on a page somewhere. They are crisp statements of how we agree to operate together so that over the long term we can sustain the relationships that make this work possible.

The best principles help to guide us when the plan breaks down, so make them observable and simple to remember.

- What key principles guide us in our work?
- What commitments are we willing to make to one another?
- If the plan breaks down, what principles will guide us anyway?

Harvest:

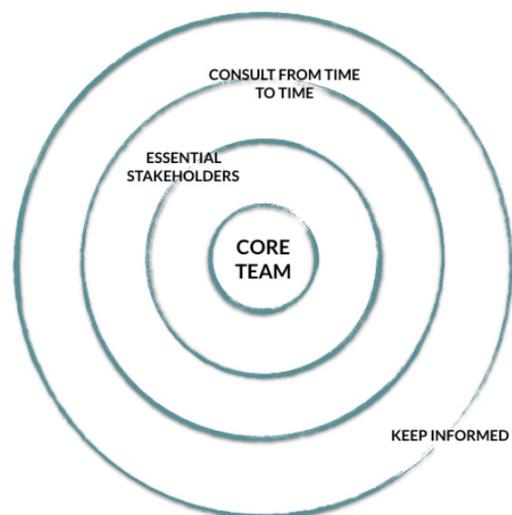
- A shared set of principles to rely on when your work enters a complex or chaotic space and you need to regroup.
- A set of commitments to one another that helps keep good work going.

People

Once the need and the purpose are in the place and we have agreed on our principles of cooperation, we can begin to identify the people that are involved in our work. Mapping the network helps us to see who is in this work for us and who will have an interest in what we are doing.

To map the network, create a diagram with a set of three or four concentric circles. In the centre of diagram goes your purpose statement. Place the names of your team in the first circle. This is the core team of people most fully committed to and responsible for the project. These might

LEVELS OF ENGAGEMENT

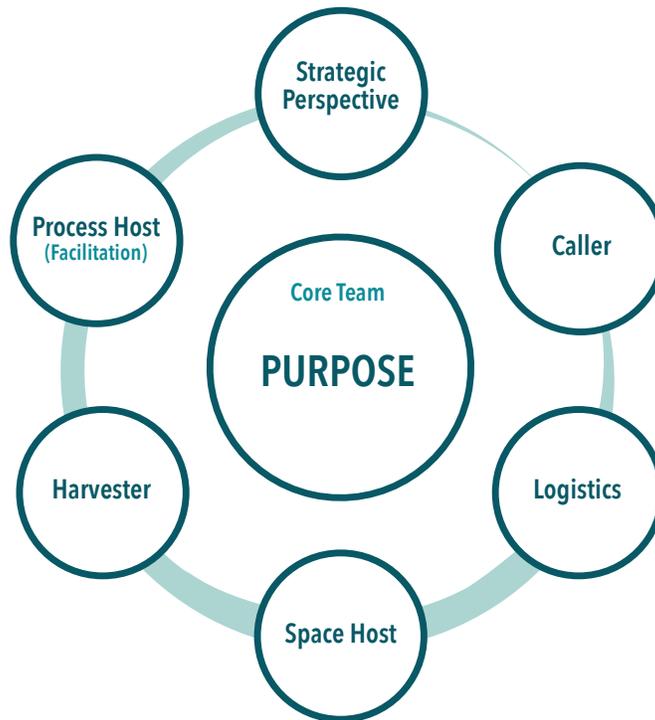


CORE TEAM

Those holding the **Strategic Perspective** are the ones who understand the need for the initiative and are connected to the power and resources to make it happen and give it the best chance of success.

The **Process Host** advises on the design of the conversations, introduces the processes, their purpose, and explains how people can participate. They hold space on conversations have started.

Harvesters capture the key insights of what the group is engaging with using different tools in order to make the learning visible and usable.



The **Caller** is the client of the process, the one who has identified the need and who holds the highest stake in what will come out of it.

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

The **Space Host** looks after both the physical and aesthetic aspects of the space and holds the objective of creating hospitable conditions for working together.

include callers, logistics people, process hosts and harvesters, those with a strategic perspective and others with key skills and roles to offer an initiative. Space hosts can be people responsible for both physical and virtual spaces, where people stay connected through the life on an initiative, project or gathering.

On the second ring, place the names of individuals who are essential participants in the process, but not a part of the core team. These might be people whose expertise you need, or whose approval or political influence are required to sustain the work. On the third ring, place the names of people who you will consult with and keep closely informed about the process. They may not have decision making authority, but not including them in meetings and gatherings will diminish the project. Finally on the fourth ring, place the names of people

who will need to know what you are up to, even though they may not be directly engaged.

This scheme and process needs to be customized for your work and your project, whether you are planning a single event or a longer term strategic initiative. In general people closer to the centre will be more committed, more involved and more responsible for the outcomes. The closer you move to the centre the more time and energy you need to spend on communications and involvement. Those towards the edges will require less intense communications - perhaps brief communication updates, or one way blasts of information. Those in the middle rings can be engaged using different types of processes that will bring them into the heart of the project on a more frequent basis.

Organizing people this way also makes it easier for people to become more or less involved in

your project. For example someone on the core team who needs to step out for time or other commitments can move out to a wider ring and still be involved. they can be replaced by someone closer to the centre, who will have to do less work to get up to speed on the work of the core team.

- Who needs to be at the core of our project?
- Who do we need to talk to to make this work, and what questions do we have for them?
- Who has answers or expertise we need?
- Who has the authority to accelerate or impede this work and how can we involve them?
- Who will be affected by this work?
- How should we communicate to the rest of the world?

Harvest:

- People and commitment
- Contact lists, invitation lists, and a set of differing levels of engagement
- Communications and engagement strategies tailored for each ring of people.

IMPLEMENTING

Participatory processes and chaordic work is all about getting better results. As we produce good results, we need to be conscious about the form and shape of the outputs of a process and how to support them.

In chaordic processes we cannot know the result before hand, but we can plan for the outputs and the architecture we need to put in place to support our results. Doing this before we choose the structure and processes for our initiative helps ensure that our strategic work has a life past the events we are planning.

Outputs

Whether you are planning a single meeting or an ongoing strategic initiative, it is crucial that you focus on the outputs: the concrete results of your work. While we can't know the content of emergent processes we can plan for the kinds of outputs we expect. Depending on what you are doing you need to know if your work will result in reports, decisions, ideas, further conversations, new structures or ways of doing things. You need to make choices about how to represent these outputs in a way that is usable and appropriate for the group you are working with.

This is the realm of results and measurement, things, decisions and processes that are created in the container of strategic work and that are to live beyond the scope of the work. Outputs must be realistic and gauged against the need and the people and resources available.

- What are we trying to make together?
- How will we be able to measure or understand the effect of our work?
- How will we make our work visible and usable?
- What are we hoping the tangible and intangible results of our work will be?
- What results will prove the worthiness of our work?

Harvest:

- Physical artifacts that effectively share the results of the work.
- Plans for implementing and evaluating the impact and results of the work.

Architecture of Implementation

The ongoing practice within the structures we build is important. This is the world of to do

lists, conference calls and email exchanges. The invitation here is to practice working with one another in alignment with the designs we have created.

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

While you can also rely on commitment and sustainability to be generated within the process, it is important to do some early planning to know what has the best chance of supporting outcomes.

- What resources (especially time, money and people) do we need to sustain our work together?
- What power and influence do we need to enable our work and support results?
- What capacity and learning do we need to build to sustain this work?
- How do we leverage relationships and support the work that arises from them?
- How do we sustain and nourish our own relationships after the work is over?
- What commitments are we willing to make to contribute to the success of our endeavour?
- What are you willing to do differently?
- How do we end what we have started?

Harvest:

- Resources and commitments that will support the sustainability of good outcomes.

STRUCTURING

Once we have established the centre of a project by connecting a need and purpose to the people who should be involved, and we have an idea how we will support implementation, we can turn our minds to the kind of structures, processes and activities that help us address our purpose. We move through three stages of identifying a concept, investigating our limiting beliefs and then finally deciding on a project plan for moving.

Concept

As we move to a more concrete idea of what our structures are, we begin to explore the concepts that will be useful. This is a high level look at the shape of our endeavour. For example, if our need was to design a way to cross a body of water, we could choose a bridge, a causeway or a ferry.

The concept is important, because it gives form to very different structures for doing our work. Coming up with a concept delays final decisions about structuring work, and it allows us to pause and check out our general direction with those who are resourcing and enabling the work. Avoid the temptation to jump immediately to a final design.

Conceptual plans are valuable because they can be used to test limiting beliefs and discover what's missing before making final decisions about how to organize the work.

- What is a good high level approach to addressing our need and meeting our purpose?
- What basic elements, activities and processes will best serve our purpose?
- How will we ensure that our work reflects our principles?

- What prototypes can we develop that will teach about our final design?

Harvest:

- A first draft, set of prototypes or sketch of what the work might look like.

Limiting Beliefs

So much of what we do when we organize ourselves is based on unquestioned models of behaviour. These patterns can be helpful but they can also limit us in fulfilling our true potential. We cannot create innovation in the world using old models, approaches and ways of thinking. It pays to examine ways in which we assume work gets done in order to discover the new ways that might serve work with new results.

Engaging in this work together brings us into a co-creative working relationship, where we can help each other into new and powerful ways of working together, alleviating the fear and anxiety of the unknown.

Limiting beliefs appear in both individuals and groups and so it's useful to engage in practices that work at both the individual level and the group level to surface and deal with fears, anxieties, shadows and limiting beliefs before we inadvertently build them into our plans and processes.

- What makes us tremble, and what do we fear about new ways of working together?
- What are we skeptical about?
- Who would we be without our stories of old ways of working?
- What is our own learning edge in working together?
- What are the cynics and skeptics saying about our work?

Harvest:

- Clarity and shared courage and commitment

- A naming and recognition of what might hold us back
- Clarity about how to support people and the process as they confront their own limiting beliefs.

Structure

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

- What are we going to do together?
- How will we enable our work to happen?
- What resources are needed in time, money and attention and where are these going to come from?
- What will happen with the results of the work?
- What logistical questions need to be resolved?
- What expertise can help us with our work?

Harvest:

- A project plan with roles, resources, activities and outcomes

This tool was developed based on ideas and collaboration with people throughout the Art of Hosting community worldwide. www.artofhosting.org

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