



Idea Navigators: Innovation Lab Guidebook

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Table of Contents

Introduction to the Idea Navigator Innovation Lab Guidebook	5
About this Innovation Lab Guide	5
What are Idea Navigators?	6
How to know if you are an Idea Navigator	6
What are Innovation Labs?	7
Understanding Complexity	7
Events, Patterns and Systems	9
How this Innovation Lab Process Works	9
A Practice Note	11
The Invitation Process	12
Finding a Topic	12
Finding Innovation Lab Co-conspirators	13
Preparing Your Invitation	13
Structure of the Invitation	14
Preparing Your Participants	14
Additional Resources	14
Sample Invitation Letter	15
The Co-initiation Meeting	17
Co-initiation Meeting Outline	17
Specific Materials Needed	19
Description of the Co-initiation Meeting Activities	19
Welcome and Overview of the Innovation Lab	19

Circle Check-in	19
Our Collective Innovation Lab Purpose	20
Teach: Theory U	20
Learning Dialogues	21
Events, Patterns and Systems: What do we want to learn and change?	23
Learning Dialogue Brainstorm: Who	24
Learning Resources	25
Closing	26
Learning Dialogues Guide Handout	27
About the Learning Journey	31
Learning Journey Methods	31
Learning Dialogues	32
Field Trips	32
Connection and Inspiration	33
Reflection and Sharing Learnings	33
Checking-in During the Learning Journey	34
About the Sensing, Reflection and Prototyping Gathering	36
Sensing, Reflection and Prototyping Gathering Outline	36
Specific Materials Needed	38
Description of the Sensing, Reflection and Prototyping Activities	38
Welcome and Check-in	38
Reflection Café	39
Reflection Café - Gallery Tour	41
Pausing	41
Prototyping	42

Enacting the Future: Action Space	44
Closing and Check-out	48
Additional Resources	48
Co-evolving the prototypes: What happens next?	49
Building an Architecture for Co-evolution	50
Staying Together	51
Wrapping Up	51
Logistics, Materials and Online Sharing Spaces	52
Organizing Meeting Dates	52
Choosing Venues	52
Food	52
Virtual Meeting Spaces	52
Online Sharing Spaces	53
Materials	53
Additional Resources to Support Idea Navigators	54
Resources on Hosting, Personal Leadership and Participatory Methods	54
Resources on Complexity and Systems	54
Resources on ChangeLabs and Social Innovation Tools	55
Inspiring and Catalyzing Videos	55

Introduction

Introduction to the Idea Navigator Innovation Lab Guidebook

Non-profit organizations and communities face many persistent challenges that seem unsolvable. These are challenges that arise from systemic dynamics, from the complex interactions of dozens of factors. At times it feels like interventions, programs and initiatives are simply “moving deck chairs around” while the real issues go unaddressed.

Creating the capacity to see and work with complexity is a key skill set for community organizations. And to be able to do that collaboratively sets the stage for communities to become more resilient and adaptable and to develop the capacity for social innovation.

But this isn't an easy road. Working with complex systems means becoming skillful in living with uncertainty and becoming practiced at creating the spaces of collective intelligence, social innovation and collaboration. It means being able to work with finite resources, unlimited creativity and being able to enlist a wide variety of resources to work with problems.

Our culture is consumed with models of programming and social services that seek certain outcomes and logical plans and pathways to these outcomes. But contexts, rapid changes and deep systemic dynamics often conspire against a tidy view of improving the world. Developing the individual and collective capacity to live with and work effectively with capacity is what Idea Navigators are all about. Developing this expertise in communities increases the chances for sustainable social innovation and transformative work.

About this Innovation Lab Guide

This guide is intended to take the world of complex social innovation and make it available to individuals and organizations working in communities. We outline a proven method for addressing complex challenges and point you to resources to support a practice of seeing these challenges and collaboratively responding to them with new forms of social innovation. This guide is intended to be used by practitioners with some experience of complexity, social innovation and participatory leadership and supports the practice of “Idea Navigation” in communities.

If you are new to this field, we hope that this guide will provide you with a clear introduction to this new way of working and invite you to develop a practice. If you are

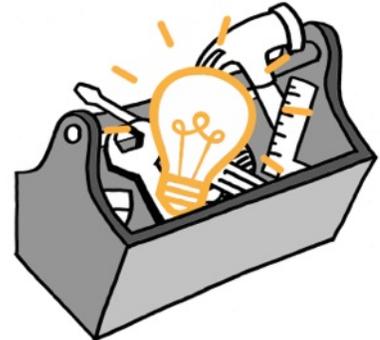
more experienced, we hope this guide will support your continued learning, development and experimentation with participatory methods of social innovation.

What are Idea Navigators?

Idea Navigators are small groups learning and working together to innovate around common needs. Idea Navigators are people in communities and organizations that can see what is happening. They are people that are able to understand the way complex and emergent issues and dynamics arise, and have the skills to invite participants into focused learning and innovation processes. Many of the most intractable problems we face in communities can only be addressed with new and different approaches. Funding and expertise tends to want to support “best practices” and “evidence based practice” often without consideration to the differences in contexts between organizations, communities and problems.

What is often needed is for a diverse set of individuals to engage in learning and innovation together, to study the system at different levels, garner new perspectives and create prototypes and experiments that might shift our approach to problems.

Learning together is how we will address tough problems. Such an approach requires people who can help groups and teams to navigate through ideas and create a disciplined learning lab for the creative development of new ideas and approaches.



It is our hope that these resources and methods will help communities develop these capacities and a set of practices that bring new ways of learning to old problems. See here <<insert link to Zack’s video>> for a short video on Idea Navigators and hear from participants involved in an Innovation Lab.

How to know if you are an Idea Navigator

The tools and approaches in this guide will be useful to you if you recognize the some of the following characteristics:

- You face complex problems with no easy answers.
- You cannot find expertise to solve the problems you are facing and know the problems need to be addressed in a different way.
- You feel you need more perspectives to understand problems and innovate; to reach outside of what you already know.

- You know that what you are facing has its roots in systemic dynamics, often beyond the scope of what you feel you can address.
- Your problem can be named and discussed, but not always clearly understood.
- There are other people around you that can see these issues
- You have familiarity with Theory U, as this Innovation Lab process is based on the U journey. *For more information on Theory U [see here](#).*

Idea Navigators are people who are able to call a group together to address these kinds of challenges using innovation lab methodologies. Idea Navigators support groups in undertaking innovation labs by hosting process, bringing perspectives and modeling learning and participatory leadership.

What are Innovation Labs?

Sometimes known as social innovation labs, learning labs or change labs, these are participatory processes that combine design thinking, group process, dialogic learning and prototyping to create new solutions to complex problems. Innovation labs differ from research projects in that they build a learning and innovation capacity among the stakeholders and invite diverse approaches to problems and issues. *For more background on Change Labs [see here](#).*

Here are some examples of where Innovation Labs have been used:

- [Thrive by 5](#): Multi-stakeholder change initiative on early childhood development in Calgary, Alberta.
- [Waterlution](#): Fostering pattern-breaking and pattern-making change towards inclusive, sustainable ways to manage water.
- [Sustainability Transition Lab](#): Finding a path to a sustainable society by enabling sustainability literature and collaborative capacity among stakeholders.

Understanding Complexity

The field of social innovation demands an understanding of complexity. Complex problems present themselves with the following characteristics:

- They are emergent: there is no clear cause and effect relationship.
- They are multifaceted and not easy to reduce down to a clear cause and solution.
- They are context dependent, and therefore solutions are not always transferable from one context to another. For example solving issues of poverty

in downtown Vancouver is different from addressing issues of poverty in rural Mozambique.

- They cannot be solved by achieving a goal. Complex problems, like belonging, security, wellness and literacy require an ongoing practice. There are no finish lines.
- They cannot be solved without a diversity of players involved. In other words, complex problems lie outside the ability of any single person to fix them.
- They defy predictability, certainty and clear goals.

These are sometimes known as “adaptive challenges” a term which contrasts with “technical challenges”. In their book *Leadership On The Line*, Ronald Heifetz and Martin Linsky articulate the difference this way:

Every day people have problems for which they do, in fact, have the necessary know-how and procedures. We call these technical problems. But there is a whole host of problems that are not amenable to authoritative expertise or standard operating procedures. They cannot be solved by someone who provides the answers from on high. We call these adaptive challenges because they require new experiments, new discoveries and adjustments from numerous places in the organization or community. Without learning new ways – changing attitudes, values and behaviors – people cannot make the adaptive leap necessary to thrive in new environments. The sustainability of change depends on having the people with the problem internalise the change.

Complex challenges that require adaptive solutions will not be solved with technical solutions. It is impossible for example to “fix” racism, homelessness or drug addiction. These are problems that need to be addressed. And because there is no clear relationship between cause and effect, research into root causes is often not helpful. A common response to these challenges in the non-profit sector is to research, plan, set targets, design programs, implement and evaluate outcomes.



This traditional model provides the comfort of a well-understood process with clear outcomes. The problem is that in order to achieve that clarity at times important externalities remain unaddressed. For example, an agency could undertake a program to address racism by deciding that a key indicator of racism is hate crimes. A program can be designed based on good research to address hate crimes, an implementation undertaken and one could measure a clear number to see if the program did in fact reduce the number of hate crimes.

However, such a program does not get at the underlying causes of racism in a community and may ignore more pernicious racism in the labour market, in access to

services or in economic equality. Addressing the number of hate crimes, while a worthy undertaking, nevertheless externalizes these. It is simply too difficult a problem to solve.

For more on complexity see the Harvard Business Review paper [“A Leader’s Framework for Decision Making”](#) by David J. Snowden and Mary E. Boone.

Events, Patterns and Systems

Much depends on how we view systems. Adam Kahane, a principle designer of the ChangeLab methodology often uses the analogy of waves crashing on a beach to describe how we fail to work at systemic levels.

In such a system a single wave is a discrete event. If you watch the wave after wave coming ashore, you will notice that waves are organized in patterns: there is a certain height to each one, they come in sets, there is a consistent interval, the break the same way and so on. These patterns are interesting, but to understand them you have to understand the systems that produce these patterns, including the rise of the ocean floor, the interaction of wind and current, the properties of water and so on. Often in the world of social solving problem we work at the level of addressing events, or at best patterns. And we often do so without inquiring into the underlying systems that keep these patterns in place. Creating solutions to address events and patterns will stop temporary manifestations of the system, but they will rarely address the system. Dredging the beach or putting up wave breaks changes the system (and of course, produces a different and unpredictable set of patterns and events).

Working with complexity means getting good at living with ambiguity and uncertainty, and looking together into the deeper systemic factors that seem to keep us stuck in doing the same old things in the same old ways.

This requires us to adopt the capacity to learn and change along with the systems we are embedded within. Social innovation labs and Idea Navigation is about practicing this worldview and working out of this theory.

How this Innovation Lab Process Works

In this guide we will introduce you to a process that can be used in your community to help people navigate through new innovative ideas. We will describe a learning lab process and describe the roles that an Idea Navigator can play in helping this process run.

Our Innovation Lab model provides a structured process for a group to undertake in a six to eight week learning journey, to look at complex problems and begin to create

prototypes for addressing them. This learning journey includes face-to-face gatherings, focused learning, and prototyping processes.

The guide will touch on the following:

- Identifying a problem for innovation
- Calling together an innovation group
- Hosting a one day co-initiation meeting
- Structuring a six to eight week collaborative learning journey
- Hosting a one day prototyping meeting
- Evolving the prototypes

This process is intended to increase the capacity in your community or organization for facing and addressing complex challenges with fresh eyes and approaches, while building capacity and skills to work with complexity and uncertainty.



Some of the benefits of the Innovation Lab process include:

- Creating a set of observations of and insights into the system, into the ways in which the system might develop in the future, and into how participants might influence the system's development. All of these ideas can be used as inputs into prototypes.
- Building a sense of community among the journeyers.
- Experiencing renewed energy and camaraderie.
- Fostering a web of relationships with key players inside and around the system.

A Practice Note

Though we have based the practices in the Innovation Lab on our own experiences, we view them as a set of notes drafted by explorers in a dynamically evolving field. We fully expect that each reader will put his or her own stamp on the practices, depending on the nature of the challenge and the core group that forms to meet it.

Though you're welcome to apply the practices in the order they're shown in this guidebook, you may find yourself circling back to revisit earlier practices, reflecting the iterative nature of the U process.

Innovation Lab Invitation

The Invitation Process

Part of the first step of creating an Innovation Lab is determining the focus. What is the complex problem you want to focus the Innovation Lab around? What are the challenges and opportunities your community is facing? What is the need that could be uniquely met through this Innovation Lab and learning journey?

Determining the focus is an iterative process. Once you have an idea of your Innovation Lab topic, talk to people, sharing your thoughts, hopes and questions. Share a story that inspires others to think, feel and act with you. Listen to what people respond to, and learn more about what is happening in your community. These conversations are like a homework assignment to research, clarify and shape the focus of the Innovation Lab.

Finding a Topic

Innovation Labs work best around topics that are perplexing, for which there are no easy answers and around which a group of people seem stuck. When you are confronted with a subject like this, test it out with others. Confirm that others are feeling this way. You will find people who have been frustrated trying to address the same challenges as you. You may have tried a number of different approaches and nothing works. That makes for an excellent topic. Not only will you need to learn differently about the problem you face, you will also have to organize differently around how you address that problem.

It is important that you choose a problem that is within your scope to address as well. If systemic poverty is an issue for your community for example, you will need to find ways to address the way that problem manifests in your community. You might choose to focus on questions like:

- How do we support families that are affected by the economic shifts in our community?
- What are new ways of creating local economy?
- How can we rethink the economic basis of this community?
- How can we create resilience to take us through this downturn?

These questions have no easy answers, but they can be addressed by bringing together a diversity of stakeholders in the community to help co-create solutions.

Finding Innovation Lab Co-conspirators

Through your conversations with others the focus is refined and you will become clearer on the people you want to invite to join the Innovation Lab. While you have been talking to people and shaping the focus, who has come to mind as a possible member of the Innovation Lab? Who has expressed interest? What attributes do you hope people will bring? Make a list of these people, and think about:

- Who are other people holding the same questions in your community? Who else cares and could make a difference? What new people could you invite into the conversation?
- What diversity do you seek (gender, age, ethnic, racial, religious, economic, hierarchical, organizations, etc.)? Why are you seeking or limiting diversity?
- What shared understanding do people need to have?
- Will they be able to make the commitment you are asking of people (e.g. six to eight week timeframe with up to three hours per week of active learning and engagement, two one-day off site meetings, and an hour every week or two of web calls to connect what we are learning)?
- Who has the resources in the community to implement prototypes?

You want to aim for a small diverse group of committed, connected and curious people who are able to bring a wealth of connections and perspectives to the problem. We recommend a group of about twelve to fifteen people for most problems, but that will depend on the scope of the challenges you face.

Preparing Your Invitation

As you find participants and meet them face-to-face, you will be refining your invitation and inquiry. Clarity begins to emerge and when you are ready to begin the Innovation Lab, you can sit down and write a formal invitation.

Write an invitation that moves people to say “yes” to the Innovation Lab. You will want to articulate the clear purpose of the Innovation Lab, how this will affect their work and community, why they should take time and attention away from their regular workload, what is required of them to participate well, as well as some information on Innovation Labs.

It’s important that you have hosted little conversations with your invitees before the invitation goes out to find out what would attract them to joining the Innovation Lab. Then once your formal invitation goes out, follow-up with any personal phone calls or meetings. Invitation is a process. It is not enough to simply send a written invitation out to your group of preferred participants. The process of co-creation begins the moment you co-initiate the learning lab together. The invitation and the topic of choice will

evolve as people become more involved in the process. This is a good thing because it starts the process of working adaptively to meeting the challenge.

Structure of the Invitation

Invitations should contain some of the following information:

- An articulation of the topic and why you think it is important.
- Some text about who is being invited and why they have been asked to participate.
- Information about the process so people can be prepared to come and participate well.
- Information about what is expected of Innovation Lab participants in terms of commitment, time and attention to the process.
- Questions for participants to reflect on before they come together.
- Dates and times of proposed gatherings. *See the Logistics Section for tools to support scheduling, venue selection and more.*

See the sample invitation letter included after this section.

Preparing Your Participants

Before you meet for your co-initiating meeting, it helps to have participants meet each other informally (even if some people already know each other). This could be a face-to-face meeting or a conference call. However you do it, take about an hour to check in. Invite each person in turn to speak about why this topic matters to them and what inspires them about the invitation. This is a “get to know each other” piece and it serves to begin to build the relationships between participants. If you can meet in person, come together for a shared meal or for drinks and makes the process deliberate but informal. *See the Logistics Section for tools to support virtual meetings (below).*

Additional Resources

Block, Peter. (2009) *Community: The Structure of Belonging*

Holman, Peggy. (2010) *Engaging Emergence: Turning Upheaval into Opportunity*

Sample Invitation Letter

INVITATION

Join us for an Innovation Lab on _____

What we are inviting you into? Why you?

We invite YOU to join an innovative learning group called IDEA NAVIGATORS, to engage in some innovative learning and work together over a eight week period, to address the challenge of _____.

We are inviting you because you have a perspective on this challenge and you have a part of the answer.

Our focus

We are inviting you to be a part of a co-created Innovation Lab with a small group of peers in your community to look at the emerging edges and opportunities for the sector. We want to invite you into learning right at your very edge.

[Explain the NEED for your project here: what have you noticed? Where are you stuck? What are the deeper problems that you are trying to address?]

What we will be doing together

Over the course of the next two months, we will initiate a moderately intense learning journey designed to dive deep into the challenges we face and emerge with some ideas and prototypes for addressing these challenges and creating new opportunities. We are trying to lead together from the emerging future.

We will use an Innovation Lab methodology, based on the work of numerous practitioners including Adam Kahane and Otto Scharmer, and recommended by the [BC Social Innovation Council](#). Watch a great video on an Innovation Lab on StepUpBC's YouTube Channel as well as this [ChangeLabs video](#).

Our work will begin on **[DATE AND LOCATION]** with a one-day meeting where we will dive into a dialogue-based discovery process with each other to begin to discover the systemic nature of the challenges we are facing. We will co-create a learning journey together, generating curiosity on topics and questions that will help us learn about the nature of the challenge.

Following our initial meeting we will undertake a learning journey together, engaging with people in our community to more deeply understand the system we are dealing with and connecting with global thought leaders through videos and webinars, and co-

create new approaches to the challenges we face. **Our goal is innovation and learning.**

Finally we will conclude our work on **[DATE]** with a one-day meeting where we will work together to design new approaches to the challenges we are facing. At the end of the process we will have initiated a creative process in your community with lively new prototypes and a networked community of practice.

There is no charge for your participation in this process, but there is a commitment to the following activities, happening from **[BEGINNING DATE TO END DATE]**:

- One hour check-in web call [OPTIONAL...COULD ALSO BE A BRIEF GET TOGETHER FOR DRINKS OR COFFEE]
- One-day off site meeting to co-initiate the learning journey.
- An hour every week or two of web calls to connect what we are learning
- Up to three hours a week of active learning, thinking and engagement, including deep dive interviews, reading and writing
- One day off site meeting to reflect, sense and prototype

We would love to have you join us! Please confirm your participation with us by email or phone at xxx.xxx.xxxx.

[Your Name/Your Organization's Name]

Co-initiation Meeting

The Co-initiation Meeting

The co-initiation meeting is intended to put all your participants on the same page and to discover in each what is important about the topic choice for your work together.

Co-initiating a collective learning journey means that your groups needs to discover together what is interesting, how it is relevant to each others' work, and agree on a plan for moving forward to begin dialogue interviews.

Co-initiation Meeting Outline

You can structure the co-initiating meeting any way you like, but the following outline gives a good flow of activities that will fill a full day together. A description of the activities is also included below.

Time	Activity
9:00 to 9:20	Welcome and Overview of the Innovation Lab
9:20 to 9:50	Circle Check-in
9:50 to 10:20	Our Collective Innovation Lab Purpose
10:20 to 10:35	Break
10:35 to 11:05	Teach: Theory U
11:05 to 12:00	Learning Dialogues
12:00 to 1:00	Lunch
1:00 to 1:50	Learning Dialogues continued
1:50 to 2:45	Events, Patterns and Systems: What do we want to learn and change?
2:45 to 3:00	Break
3:00 to 3:30	Learning Dialogue Brainstorm: Who
3:30 to 3:45	Learning Resources
3:45 to 4:30	Closing



Specific Materials Needed

- Blank flip chart paper
- Agenda flip chart
- Innovation Lab flow flip chart
- Centre items and talking pieces
- Sticky notes and pens
- Learning Dialogues handout (one per person)
- Index cards
- Laptop/projector/screen/speakers/wifi if using the Theory U video

See the Logistics section for other suggestions on materials, venue, food and more.

Description of the Co-initiation Meeting Activities

Welcome and Overview of the Innovation Lab

Welcome the group. Share what idea or need started you thinking about calling an Innovation Lab (the topic/purpose). Share why did you invite this group and what you hope for the experience. Describe the flow of the Innovation Lab and the flow of today.

Circle Check-in

Invite a check-in round: Who you are and why is this work on this Innovation Lab topic important to you? [See here](#) for more information on circle process.

Our Collective Innovation Lab Purpose

From the circle we just heard, what is the shared purpose / topic of this Innovation Lab? Write it in a sentence or two on a sticky. Listen to the whole and not just to yourself. Then in partners, articulate the shared purpose / topic to each other.

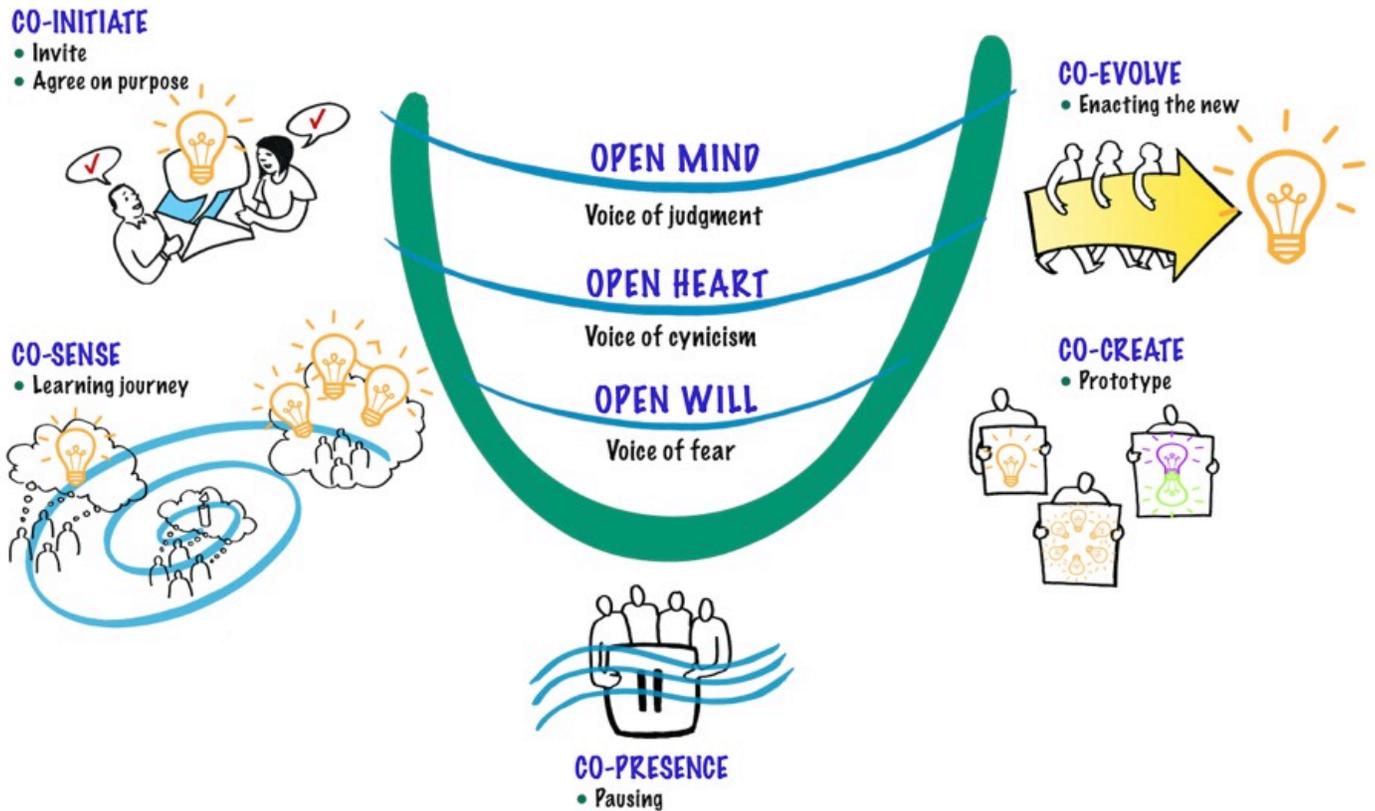
Reflect together as a group: how similar were your purposes/topics? How different?
Harvest an overall shared purpose/topic - this may mean making some small changes to the purpose/topic you articulated in the welcome.

As we move through our Innovation Lab journey we will be meeting with people and talking to them about the purpose. Doing this articulation work here is good practice for those conversation. Notice how you verbalize the purpose, finding the words that are authentic to you and connect to the shared purpose.

Teach: Theory U

This Innovation Lab is based on the Theory U process. Share [video](#) or provide teaching. [See here](#) for a good slide deck on Theory U.

On the next page there is a graphically facilitated drawing of the Theory U process that you can use.



Learning Dialogues

Part of the Theory U movement is co-sensing, where we observe, going to the places of most potential and listen with our mind and heart wide open. What is missing most in our current organizations and societies is a set of practices that enable this kind of deep seeing—“sensing”—to happen collectively and across boundaries. When sensing happens, the group as a whole can see the emerging opportunities and the key systemic forces at issue. Many efforts to effect change in a system begin with conversations among people with a stake in that system. Yet such interactions often fail to penetrate to the depth necessary to release latent forces for change.

A practice to support out sensing is Learning Dialogues, where we have one-on-one conversations with different people to talk to them about the issue. These Learning Dialogues are a set of in-depth, one-on-one conversations between you and key participants. These conversations catalyze the Innovation Lab and raise the quality of thinking and relating in the system.

Learning Dialogues are different from research/problem solving, and are not a traditional interview.

The Learning Dialogues use open questions that are designed to support the conversation and keep us in the U.

Your role in the Learning Dialogues is to listen with a willingness to be changed by what you hear. Here are some principles for the Learning Dialogues:

- Create transparency and trust about the purpose and the process of the conversation.
- Practice deep listening.
- Suspend your “Voice of Judgment”: look at the situation through the eyes of the conversation partner, don’t judge.
- Access your ignorance: As the conversation unfolds, pay attention to and trust the questions that occur to you.
- Access your appreciative listening: Thoroughly appreciate and enjoy the story that you hear unfolding. Put yourself in the other person’s shoes.
- Access your generative listening: Try to focus on the best future possibility for your conversation partner and the situation at hand.
- Go with the flow: Don’t interrupt. Ask questions spontaneously. Always feel free to deviate from your questionnaire if important questions occur to you.
- Leverage the power of presence and silence: One of the most effective interventions in a Learning Dialogue is to be fully present with the person, and not to interrupt a brief moment of silence.

Give the Learning Dialogues Guide handout to everyone – included at the end of this section. Invite people to get into pairs and then take turns hosting each other, and build in the reflection time after the conversation (e.g. invite them do a little bit of journaling after the conversation).

Possible timing:

- *One person hosts the learning dialogue and their reflection (30 mins)*
- *Individual silent reflection on the interview /journaling, other person mentally prepares for their interview (5 mins)*
- *Break for lunch - after lunch partners will switch so the other person can host the learning dialogue conversation*
- *Other person hosts the learning dialogue and their reflection (30 mins)*
- *Individual silent reflection on the interview /journaling (5 mins)*

Conclude with a group reflection on how was that for them, focusing the reflection more on the process, not the specific content of the conversation.

Events, Patterns and Systems: What do we want to learn and change?

We talked earlier about how the Learning Dialogues help us with deep sensing to see emerging opportunities and key systemic forces at issue.

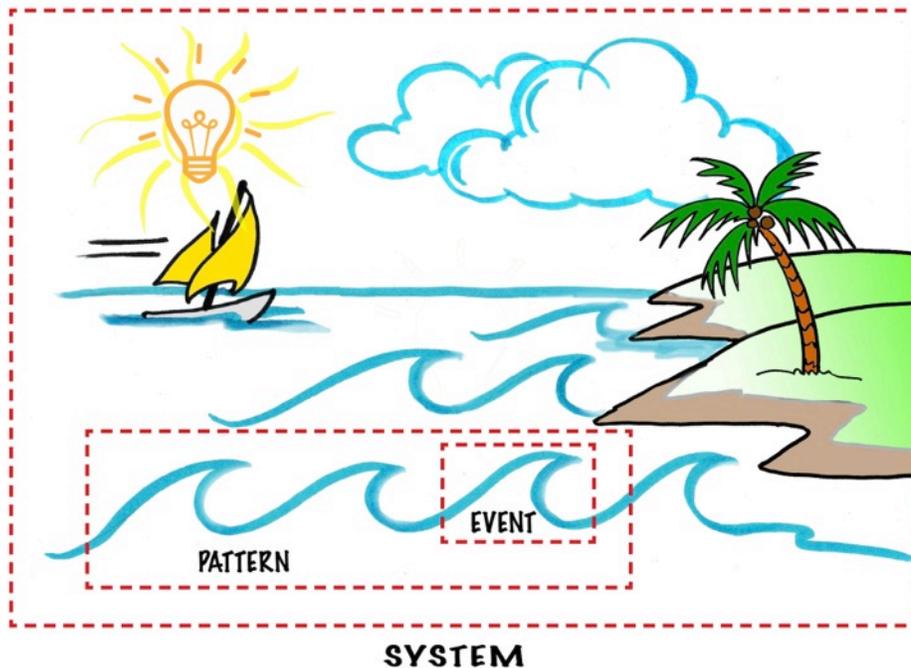
Adam Kahane, a principle designer of the ChangeLab methodology, often uses the analogy of waves crashing on a beach to describe how we fail to work at systemic levels.

In such a system a single wave is a discrete event. If you watch the wave after wave coming ashore, you will notice that waves are organized in patterns: there is a certain height to each one, they come in sets, there is a consistent interval, the break the same way and so on. These patterns are interesting, but to understand them you have to understand the systems that produce these patterns, including the rise of the ocean floor, the interaction of wind and current, the properties of water and so on.

Often in the world of social solving problem we work at the level of addressing events, or at best patterns. And we often do so without inquiring into the underlying systems that keep these patterns in place. Creating solutions to address events and patterns will stop temporary manifestations of the system, but they will rarely address the system. Dredging the beach or putting up wave breaks changes the system (and of course, produces a different and unpredictable set of patterns and events).

Working with complexity means getting good at living with ambiguity and uncertainty, and looking together into the deeper systemic factors that seem to keep us stuck in doing the same old things in the same old ways.

It's all reality - the waves, the sea, the wind - none are more or less important. But if we choose to look at the seashore through the different lenses we can understand it more fully, instead of only one lens.



Thinking about this analogy and the levels of events, patterns and the system, and the focus of this Innovation Lab, what are we curious about now? What do we want to learn more about?

Invite people into groups of three or four. What do we want to learn more about that would help us detect what is new and surprising? What we might learn through the eyes of others - both inside and outside of our system? This is not about benchmarking or comparing standards, or confirming what we already know. It is about what we could learn to see the entire system on a whole new level. Take about 15 minutes and jot down different areas of curiosity or questions on stickies or index cards.

Record some areas of curiosity from the group. Harvest a list of their areas of curiosity and what they want to learn more about.

This exploration helps inform who we might engage in our learning dialogues and learning journey. For example, if we are interested in improving collaboration between agencies and volunteers to support food security, and we are curious about how other large-scale collaborative efforts have successfully engaged volunteers, we might then identify the local Ironman organizing team as a Learning Dialogue participant. This harvest also helps inform which guest speakers or video topics we want to use during the Learning Journey.

Learning Dialogue Brainstorm: Who

Now that we have generated some areas of curiosity and learning under our topic, together let's brainstorm who we might have the learning dialogues with. Who do you want to sit down with to learn more about this issue? To stretch, to encounter new learnings and new perspectives. Think about:

- Who would I be interested to talk to, and who would it serve this inquiry to talk to?
- Diversity (age, culture, geography, perspective, domain etc.)
- Consider people and situations that might be most interesting, challenging, and different. Don't stick with the familiar and comfortable. We won't learn anything when we choose people we already agree with. Seek the 'unusual suspects' instead of the usual suspects.

Ask each person to write down five names on a sticky note, then share out who they are thinking of and why. It's helpful to watch for any overlap in potential dialogue participants. Then each person to make their list of the people they will contact for the Learning Dialogue conversations.

End with instruction that we'll be going out to have these conversations. Prepare to listen with open minds and open hearts. The key is for us to listen not just to confirm what we already know but also to detect what is new and surprising. We want to see what the system looks like through the eyes of others, and to perceive what is emerging (but perhaps not yet visible) in the system. Go into the visit with the areas of curiosity and learning in mind, but also listen for the unasked, the unexpected, and the synchronistic.

When you are setting up your Learning Dialogue conversations, pay attention to planning enough time for the conversation and the reflection. For some people the reflecting will be writing, or thinking but taking the time is important – this is not about generating a report or doing more research.

Learning Resources

As we are in a learning journey, what are some resource articles, videos, books, websites etc. that could be shared with each other for our collective inquiry? Take five minutes to reflect on and popcorn out. Harvest a list of the initial resources generated.

What might be a place online we can share these resources and our reflections, and to add new resources as we encounter them (e.g. Google Document, Hackpad, other shared platforms)?

See other ideas for online sharing spaces in the Logistics section.

Closing

Share the timeline moving forward (e.g. next call day and time, webinar day and time etc.) next steps, and any other logistics. Invite a check-out round to tap into the energy (e.g. what's inspiring you as you leave the room and move forward with the Innovation Lab?).

Learning Dialogues Guide

Learning Dialogues Guide Handout

About Learning Dialogues

Many efforts to effect change in a system begin with conversations among people with a stake in that system. Yet such interactions often fail to penetrate to the depth necessary to release latent forces for change. Learning Dialogues are a set of in-depth, one-on-one conversations between you—the practitioner, consultant, or other kind of change agent—and identified participants. These conversations catalyze the Innovation Lab.

Learning Dialogues are intended to engage participants in a reflective and generative conversation. Dialogue interviews:

- Provide you with insights into questions and challenges that the other people face,
- May help you to find partners for a project,
- Prepare participants for to an upcoming event,
- Begin to build a generative field for the initiative you want to co-create.

Purpose

To create a generative conversation that allows for reflection, thinking together and some sparks of collective creativity to happen.

Outcomes

1. Data on the participants' current challenges, questions, and expectations.
2. Increased awareness among participants about the process and how it might serve their needs and intentions.
3. An increased level of trust between facilitators and participants that helps to create a generative field of connections.

People & Place

Learning Dialogue conversations work best face-to-face. If not possible, use phone interviews.

Time

- 30 to 60 minutes for a phone conversation.
- 30 to 90 minutes for a face-to-face conversation.

Both figures are estimates and need to be adjusted to the specific context.

Materials

- Use this conversation guide, but feel free to deviate when necessary.
- Paper and pen to take notes, sometimes a tape recorder

Step 1: Preparation

- Define the specific context and purpose of your Innovation Lab, based on your co-initiation session.
- Schedule the conversations.
- If the conversations will be conducted face-to-face find a quiet space.
- Get information about the participant and her or his organization.

Step 2: Open Mind and Heart

Before you meet the person allow for some quiet preparation or silence. For example, 15 to 30 minutes prior to a face-to-face conversation begin to anticipate the conversation with an open mind and heart.

Keep in mind these principles:

- Create transparency and trust about the purpose and the process of the interview.
- Practice deep listening (see the diagram below).
- Suspend your “Voice of Judgment”: look at the situation through the eyes of the interviewee, don’t judge.
- Access your ignorance: As the conversation unfolds, pay attention to and trust the questions that occur to you.
- Access your appreciative listening: Thoroughly appreciate and enjoy the story that you hear unfolding. Put yourself in your interviewee’s shoes.

- Access your generative listening: Try to focus on the best future possibility for your interviewee and the situation at hand.
- Go with the flow: Don't interrupt. Ask questions spontaneously. Always feel free to deviate from your questionnaire if important questions occur to you.
- Leverage the power of presence and silence: One of the most effective "interventions" as an interviewer is to be fully present with the interviewee—and not to interrupt a brief moment of silence.

Step 3: The Dialogue

Begin the conversation. Use the below questions as a guide, but depart from it to allow the conversation to develop its direction.

- Tell me a story about your work as it relates to this topic?
- What are some of the patterns or issues you're noticing related to this topic that are keeping us stuck?
- Deep in your bones what do you know we need to do (even if we aren't doing it)?
- What gives you optimism? What keeps you in the work? How do you stay motivated?
- If there was one small thing we could do to make a difference what do you think it could be?

List any other questions which have grabbed your attention:

Step 4: Reflection on the Interview

Take some time immediately after the interview to review:

1. What struck me most? What surprised me?
2. What touched me?
3. Is there anything I need to follow-up on?

After all interviews have been completed, review the interview data, and summarize results in your shared Innovation Lab/Idea Navigators harvesting space.

Step 5: Close the Feedback Loop

After each interview (by the following morning) send a thank-you note to your interviewee.

Source

C. Otto Scharmer, Theory U: Chapters 17, 21

<http://www.presencing.com/tools/dialogue-interviews>

 Presencing Institute and Otto Scharmer - www.presencing.com/permissions/

Learning Journey

About the Learning Journey

The purpose of the co-initiation meeting is to prepare your group for the learning journey. You will now have in hand a shared perspective about the purpose of your work and a curiosity about what you want to go and learn from others. The learning journey can now begin.

A learning journey is different from a research project or a focus group. It is an immersive experience where you seek to learn with you mind, heart and will. At the end of the learning journey, you will have experienced the following:

- Knowledge about the patterns and system that you are working with, data and information, new insights and ideas (OPEN MIND).
- Inspiration and possibility, empathy with others stuck in the system, a feeling of encouragement (OPEN HEART).
- Excitement and willingness to try something different with no guarantee of success, courage to take a step forward together and try something new, excitement to engage, design and work together on prototypes (OPEN WILL).

In order to discover new perspectives on your problem it is important to find people and organizations that might have a different perspective on your problem. Collecting a diversity of perspectives helps to open your mind and free yourself from assumptions and limiting beliefs that can restrict your creativity in addressing the problem. Learning journeys are about following questions and curiosities and not necessarily discovering answers. You will be challenged and intrigued and your curiosity will be piqued by what you learn. All of this is fodder for the co-creative process to follow.

Learning Journey Methods

Learning journeys can take many forms and should have a mix of methods. Typically you will engage in the following activities:

- Deep dialogue conversations (learning dialogues)
- Field trips
- Connection and inspiration
- Reflection

Learning Dialogues

Dialogue will form the basis of your learning. Prepare yourself for the conversation by reviewing your questions, remembering the core purpose of the learning journey and by being curious. Begin the interview by asking about personal stories using a question like “How is your work connected to our inquiry?” and let the conversation unfold from there. As you listen to the story you will find yourself connecting ideas to the underlying inquiry. Take note of how you are inspired and how your interest is piqued. The interview will give you good knowledge and data about the focus of the innovation lab and it should also get you and your partner excited to address challenges.

A reminder that conversations of all sizes are helpful. You may only have time for a couple of in-depth conversations - and don't let that stop you from some mini inquiries at the lunch table, water cooler and such. This is all about learning as you go - being curious and open and collecting what you can, and then showing up for our day to share what we each bring and do some innovative thinking together from that place.

Tips for good listening during the Learning Dialogues:

- Listen for all three levels of event, pattern and system.
- Record your notes either in real time or very soon after the interview is over so that you don't lose insights that come up.
- Remain curious and notice where your voice of judgment, cynicism or fear is coming up. Note these places and stay open anyway. Practice the art of suspending these voices.

For more information see the Learning Dialogues Guide included in this Guidebook.

Field Trips

Participants in an Innovation Lab may want to schedule field trips to places of potential. Over the course of the learning journey you may discover that there are people and places nearby where similar problems are being addressed. As a group visiting these locations and meeting with people, watching them at work and understanding their perspectives on the problem helps your team to open to possibilities and to empathize with struggles and challenges.

Tips for field trips:

- Visit places where people are working to address the same challenges you are facing, but who are doing it in a different sector.

- Connect your systemic inquiry with the field trip. Try not to study events or even patterns, but try to get a sense of where your inquiry connects to what you are learning at the systems level.

Connection and Inspiration

Once the learning journey begins and you start carrying questions in your mind and awareness, you will start finding inspiration in lots of different places. [TED talks](#), [Innovation Story Studio talks](#), websites, articles and books will all start to appear connected to your inquiry. You may meet interesting people who have been thinking about the problems you are grappling with for a long time. With digital technology it is very easy to contact these people and invite them to spend an hour with your group over Skype or on a webinar to share thinking and get outside opinions. Especially if you are working in a small community, having access to authors and thought leaders can accelerate your learning. Email or tweet authors whose work you admire and ask if they'll speak with your group. Many will jump at the chance to share their thinking with you.

Tips for connection and inspiration:

- During the course of the learning journey, host two check-ins and one or two with a guest or video provocateur. Host a final check-in call before the prototyping face-to-face gathering. *See below for more information on check-ins.*
- The check-ins can be face-to-face or virtual.
- For any webinars with guests or videos, it's important to curate that experience. The check-in is important to *weave*, and the webinar guest/video to *deepen*.
- When you choose a video or guest speaker, choose someone who will serve as a catalyst and provocateur for your group's thinking. Push the edges of your knowledge comfort zone.

See the Logistics Section for suggestions on virtual meeting tools and more.

Reflection and Sharing Learnings

As you proceed through the learning journey, take time to reflect on what you are learning. Keeping a learning journal will help you to recall thoughts and jot down inspirations. Making time for intentional reflection after dialogues helps to ground your learning and record new ideas while they are in the very early stages of development. [See here](#) for a *Reflection Toolkit*.

In collaborative learning journeys it is good practice to share the learnings with your team. An easy way to do this is to set up an online space using free tools like

Wordpress, Weebly, Squarespace or tumblr. Alternatively you could set up a shared Google Document to hold ideas and resources or create a Facebook group. These tools depend on your group members and their preferences, but it is worth it to make your learning visible to each other and find a way to host online discussion between face-to-face conversations.

See the Logistics Section for suggestions on online sharing spaces.

Checking-in During the Learning Journey

While the learning journey is underway it can be very helpful to meet face-to-face every week or two to check-in and share learnings. The group's inquiry will evolve and change over time, especially if group members are talking to people that are radically outside the centre of the problem. Checking-in with each other is a good way to accelerate the group's learning.

A check-in meeting could happen online or over a conference call, but if possible try to meet face-to-face. Set aside 60 to 90 minutes to reflect on insights that are arising and to share information about new dialogue participants or changes in the direction of the inquiry.

A sample check-in meeting flow might look like this:

- Invite each person check in around the questions: "What have you been learning this week? Where have you been inspired and challenged?" Record insights.
- After the check-in round, have an open discussion about what the next learning dialogues can be and how the learning journey is proceeding.

See the Logistics section for suggestions on virtual meetings spaces and scheduling tools.



Sensing, Reflection and Prototyping Gathering

About the Sensing, Reflection and Prototyping Gathering

At the conclusion of the learning journey the group comes back together to engage in three activities: reflection, pausing and prototyping.

Reflection provides an opportunity for learning journey participants to share what they have learned in the course of their conversations.

Pausing provides a chance for participants to integrate the learning.

Prototyping begins the process of creating new solutions by rapidly building models of new solutions and figuring out how to enact them in the existing system.

Sensing, Reflection and Prototyping Gathering Outline

The activities in this gathering can be completed in a one day meeting, or may be spread over two or three sessions. The following outline gives a good flow of activities that will fill a full day together. A description of the activities is also included below.

Time	Activity
9:00 to 9:45	Welcome and Check-in
9:45 to 10:40	Reflection Cafe
10:40 to 10:55	Break
10:55 to 11:15	Reflection Cafe: Gallery Tour
11:15 to 12:00	Pausing
12:00 to 1:00	Lunch
1:00 to 2:30	Prototyping
2:30 to 2:45	Break
2:45 to 4:30	Enacting the future: Action Space
4:30 to 5:00	Closing and Check-out

Specific Materials Needed

- Agenda flip chart
- Talking piece
- Reflection Cafe flip chart templates - one per table (see below for sample)
- Markers
- World Cafe Etiquette poster
- Reflection Cafe Questions on flip charts (round one question and round two question)
- Flip chart with Pause questions
- Pens and note paper for journaling
- Various materials for the prototyping, such as pipe cleaners, paper, modeling clay, egg cartons, fabric scraps, popsicle sticks, cardboard shapes, small toys and objects from the natural world
- Blank pieces of paper
- Six to eight copies of an Action Space template (see below for a sample)
- Flip chart with Reflection questions

See the Logistics section for other suggestions on materials, venue, food and more.

Description of the Sensing, Reflection and Prototyping Activities

Welcome and Check-in

Welcome the group and describe the flow of the day:

- Reflection: Through our check-in and a Reflection Cafe. The purpose of reflection is to gather the group together and share learning, insight and inspiration. It is a chance to look at the individual learning and discern collective insights together.
- Pausing provides a chance for participants to integrate the learning.
- Lunch!
- Prototyping begins the process of creating new solutions by rapidly building models of new solutions and figuring out how to enact them in the existing system.

- Enacting the Future: We'll build on momentum from our Prototyping with an Action Space to name some specific ideas for action we want to carry out of the room.
- Closing check-out.

Host a circle check-in, inviting the group to share any personal highlights on this learning journey (webinars, learning dialogues). Perhaps something that inspired you or that you are learning. Share a few sentences.

Reflection Cafe

The Reflection Café, based on the World Café, will give us an opportunity to be in some small group conversation to look at what we have been learning from the perspective of patterns and the system that is generating the problems that we are facing.

Ask participants to gather into small groups of three or four at tables and have them look at what they have learned from the perspective of patterns and the system that is generating the problems the group is facing.

On each table place a flip chart template and markers for recording insights. The template is a flip chart divided into quadrants with the following titles:

- Quadrant 1: What needs did you hear
- Quadrant 2: What challenges did you hear? Where were the places where people felt stuck or discouraged?
- Quadrant 3: What surprised you?



During the break, post the completed templates on the wall or on the floor to prepare for a Gallery Tour.

Reflection Café - Gallery Tour

When the group returns from the break, have participants engage in a gallery tour, looking at what was recorded while discussing it with others. What themes do they notice? What has energy? What are they curious about?

Pausing

As a framework for creating new solutions, Theory U contains a “presencing” which is a pause for individual introspection. By this point in the learning journey, the seeds of possibility are beginning to be planted. All that remains to do is pause, reflect and notice what needs to be let go of.

Pausing is an active process. Here is a good exercise to facilitate the pause:

1. Have participants prepare themselves by gathering up a pen and a journal.
2. Give participants these questions:

- a. What do I need to let go of? What are the voices of judgment, cynicism, and fear saying? *If there is time participants may choose to take these thoughts to inquiry using [The Work of Byron Katie](#).*
 - b. What are the seeds of possibility that I am sensing now?
 - c. What do I feel ready to take on?
3. Have participants find a quiet place where they can be alone with their thoughts. This is an opportunity for people to be still. If you have access to the outside, finding a place in nature is very conducive to this activity. It is important for participants to do this work alone and still (so no walks!). Participants should take at least 30 minutes to reflect on this question. More time is better, even as much as a half day.



Flow from the pausing straight to lunch and then to take the energy of the reflection into prototyping.

Prototyping

Building prototypes means to create models of the new system rapidly and without attachment. Building prototypes allows participants to work together to try new things, gain important insight and iterate designs.

Facilitating a prototyping exercise begins with inviting people to let go of their attachment to perfect solutions. Prototyping allows you to think by *building* a model, rather than *planning* and then building a model. Participants should be encouraged to be playful, creative, collaborative and improvisational. The goal of a rapid prototyping exercise is to construct a model of a solution that helps the group to see possibilities.

This is serious play: Model building is intrinsically creative, it is collaborative, it uses more cognitive capacity, and it makes it easier to express complex ideas.

To run a prototype construction exercise, begin by gathering together a variety of materials. Examples might include, pipe cleaners, paper, modeling clay, cardboard shapes, small toys and objects such as twigs and rocks from the natural world. These objects will be used to create representations of the future.



Here is a good exercise to facilitate the prototyping:

1. Invite people to work in groups of four. Gather around tables with a selection of materials nearby.
2. The group should immediately begin by constructing a tangible model of a solution - make a model of what you can do together. Not asking you to *talk* about what you believe you can do together, asking you to *make* a model of what you can do together. This exercise should begin in silence. Build first and then the story comes second.
3. Two preconditions for this to work: It means what I say it means (not for you to interpret my model) and everyone must build. Give the group 30 to 45 minutes to build something rough. Participants should be encouraged to build off of others ideas and start talking once the model begins to take shape.
4. Sharing and reflecting. Have each group choose a spokesperson who has a robust personality and will not bear a grudge (and note that others from your group will likely jump in to help tell the story of your model). Have the groups stop and tour each other's models. This process allows participants to talk about their solutions and to receive feedback and other perspectives. The goal in this process is to explore solutions and improve ideas. Share what you liked about the models and what may make them stronger. As you listen to the feedback and perspectives on your model, practice the same quality of deep listening you held in your Learning Dialogues:
 - Suspend your "Voice of Judgment": look at the situation through the eyes of the person sharing, don't judge them or get defensive.
 - Access your ignorance and your appreciative listening: thoroughly appreciate and enjoy the perspective that you hear unfolding. Put yourself in the other person's shoes.
 - Access your generative listening: Try to focus on the best future possibility for the model and this work together.
 - Go with the flow: Don't interrupt. Ask questions spontaneously.

- Be fully present while the feedback and perspectives are shared.

Groups can spend 15 to 20 minutes on each model.

Move into a break, inviting people to think about a project, idea or area for further exploration. After our break we will build on the momentum from our prototyping and move into an Action Space – a chance to name some specific ideas, possibilities or projects that you want to explore further – to recruit some thinking partners and dive deeper. To sow some seeds before we leave this room.

Enacting the Future: Action Space

Have five or six blank pieces of paper (8.5x11 or quartered flip chart paper) and markers available. The number depends on the number of people in your group - estimate one piece of paper for every 3 or 4 participants.

Now that we've done some prototyping of possible models or solutions, we can tap into our energy and ideas for some action work. Action arises from the personal choice to responsibility for what you love. Our intention for this action space is to identify a number of action ideas that you have the passion and responsibility for to start now and move forward.

How are you inspired by what we have been building together? What do you want to be doing that you aren't doing now? What are some ideas or possibilities you'd like to explore further today? To recruit some thinking partners and dive deeper. What seed do you want to walk out with today as a little growing shoot?

Today we have space for up to _____ ideas to be 'posted and hosted'. Needs to be a manageable amount, as this isn't about generating an unrealistic list of to-dos. If you post an item you are an Action Champion. It doesn't mean you are married to it forever. At the end of the time today you might decide to release the idea, or hand the baton over to someone else.

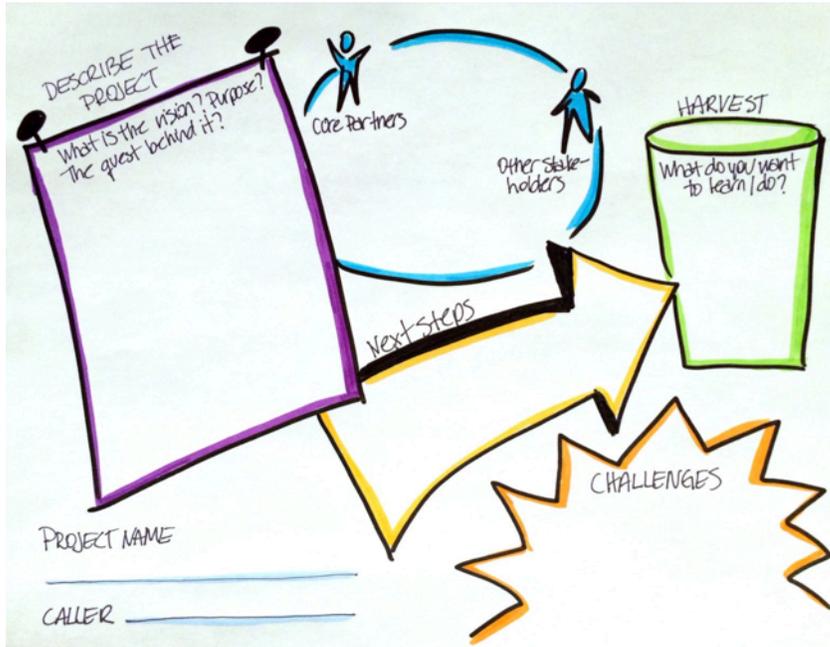
We have up to _____ spots available for ideas/projects. The principle is first come first served. The rest of us can use the law of two feet (if you aren't in place where you aren't learning or contributing, go someplace you can). AND this is a time to practice generosity - next time it might be you offering an idea for exploration!

There is a Harvest template to use that will help give some focus and structure to your conversation (describe the project/idea, core partners, other stakeholders, next steps, what you want to do/learn). You will be leaving with a little plan.

An important note about your ideas and the conversations: as we are working with complexity, we want to focus on safe-to-fail experiments rather than fail-safe design.

These experiments are not necessarily designed to succeed but to create insight and understanding about what is possible. So also think about how we will know if the idea is failing and any recovery strategies in addition to success indicators.

Here is a sample Action Space harvest template:



Once we fill up to all ___ spots we will have two simultaneous conversation rounds to start the action work using the template. We'll break up into two or three action conversations for the first round (30 minutes long), then shift to the other two or three action conversations for a second round (30 minutes). We'll come back together for a quick harvest round and hear declaration from the Action Champions.

Think about the focus of this Innovation Lab and what you have discovered through the learning journey and today's prototyping. Do you have an idea to name today? People with a call / project claim a piece of paper and name your idea for the group to hear.

Once the project spaces are claimed, divide the ideas in half with half of the ideas being hosted in the first round, and the other half of the ideas being hosted in the second round. Invite the Action Champions to spread out around the room and the rest of the group to practice generosity and find a group to contribute their thinking to. Have fun!

Come back for a harvest round: to hear a declaration from the action champions of their action and the first next step. Applause!

If there is time, before the harvest round you could invite the groups to send a spokesperson to another group to share the idea and invite some peer feedback and coaching (e.g. what they liked about the idea and what could make it stronger).

Closing and Check-out

Speak to the plan to stay together moving forward. The best way to stay together is to agree on a date to meet within a month to compare what we have learned and see what to do next. This would be the bare minimum decision to make. Ensure people bring their schedules to this part of the meeting and get agreement on a future meeting date - or use Doodle Poll to have determined this before the meeting. *See Evolving the Prototypes section for additional information on staying together.*

Moving into the closing check-out, invite some silent individual reflection: Think about how these ideas apply to my own work and our work in our community....How have you been you inspired by what we have been building together? What do you leave this Innovation Lab with? What do you see happening next for yourself? Allow some quiet time for individual reflection (e.g. 5 minutes).

Invite a check-out round, asking each person to speak a few words on what they leave this Innovation Lab with.

Additional Resources

Meadows, Donella. [*Leverage Points: Places to Intervene in a System*](#)

Gray, D and Brown, S and Macanuso, J. (2010) *Gamestorming: A Playbook for Innovators, Rulebreakers, and Changemakers*

[IDEO Human Centered Design Toolkit](#)

Co-evolving the Prototypes

Co-evolving the prototypes: What happens next?

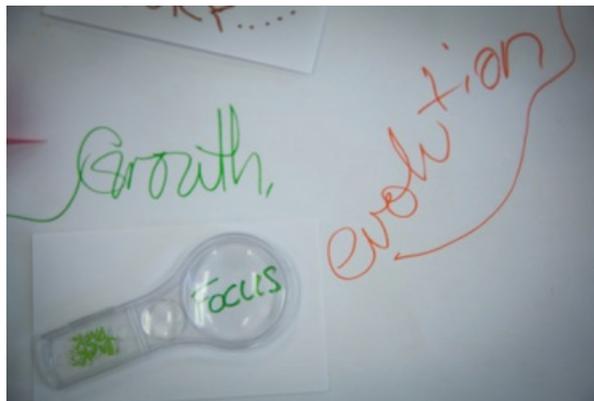
The Idea Navigators process is different from a typical planning process in that the goal is to create prototypes to try and evaluate as you go. The point is to address systemic challenges and patterns with new ways of working. There is no guarantee that these new ideas will work, so it is important to learn as you go.

At the conclusion of the prototyping meeting, you should have a date arranged for project champions to meet again, preferably within a month. This next meeting is simple but important. Committing to meeting again to share learning and asking for help is key to sustaining change efforts.

The first and all subsequent co-evolution meetings are very straightforward. The purpose is to connect together, help re-iterate the projects and decide what is working and what is not.

A sample agenda for a two-hour meeting might go as follows:

- **Check-in round:** What have you been up to since we last met? Harvest the information on a single sheet of paper so people can see the relationships and connections between projects. Invite participants to note where they are making headway and where they are challenged.
- **Seek patterns:** After the participants have had a detailed check-in, open up the conversation to brainstorm how projects could support each other. This may result in a series of commitments to work together, some time set aside to redesign a project or the decision to abandon a prototype altogether.
- **Make decisions:** Make decisions together that helps the group continue to pursue the prototypes that are working.





Meeting on a regular basis allows you to continually re-iterate your prototype, to learn and tinker with it as you go. This is important because in the early stages you will find that a prototype needs some redesigning in order to meet the specific context in which you are working.

Building an Architecture for Co-evolution

With some luck and persistence the prototypes that are begin to show some promise will start becoming established. You will know your prototyping is working when clear measurements are being met. As prototypes become more effective, you will want to become more strategic about supporting them. This may involve your group turning their attention to finding political support and resources to concretize and institutionalize promising practices. Engage in conversations with people who have the power to support your idea moving to the next level and present them with the evidence that you have something of promise on your hands. Ask them how they think they can help and expand the circle of support that way.

Systemic change happens at the margins but it becomes effective when you move into the centre. Change agents need to be tactical about how they introduce ideas into the system. If you don't yet have the power to effect change with your new prototypes, start to find people that do and that can help you navigate the pathways to the centre of the problem. Donella Meadows' classic essay [Places to Intervene in a System](#) can be very helpful for groups who are needing to make strategic decisions about how their change initiatives can grow to have real impact.

Staying Together

Sustainability comes from staying together and feeding a feeling of accomplishment and success by sharing small gains. Don't be afraid to let go of ideas that aren't working. The purpose of building prototypes is to discover how to work systemically with the system. You will learn a lot by running with a plan and seeing where it goes. Share challenges and successes together. You might host a [Collective Story Harvest](#) process as a way to learn from the action work you have engaged in. *See the Resources section for more information on hosting a Collective Story Harvest.*

Wrapping Up

All activities have a natural life cycle. There will come a time when your work together feels finished. It is wise to create a clear ending when this is the case. When the energy flags, when you have gone as far as you can together, when your successes have been enacted on a broader scale, you should conclude the process with a final meeting.

In the final gathering make time to celebrate your progress, to thank and acknowledge each other and to formally release your work to the world. You may discover that you want to start the whole cycle again, or that it is time to go in separate directions. Whatever decision you take, when the time is right, make a clean cut and release the work into the world.

Logistics and Materials

Logistics, Materials and Online Sharing Spaces

Here are some tips and tools to assist the organization of the meetings such as organizing meeting dates, choosing venues, food, virtual meeting spaces, online harvest spaces and materials.

Organizing Meeting Dates

[Doodle Poll](#): Free, web scheduling tool that helps find a date and time that work for everyone's schedule

Choosing Venues

For any in-person gatherings, choose a space that is new or neutral for participants. Ideally one with natural light, comfortable chairs and tables that can be rearranged easily, with natural surroundings. Arrange the meeting space in ways that encourage maximum simplicity, concentration, and relaxation. Your objective is to create an environment that helps people shift out of their usual harried, reactive mindset into a more relaxed and creative one.

You also may need a laptop, screen, projector and speakers for any video or display needs.

Food

Breaking bread together is an act of community. Provide healthy, nourishing snacks and food, tea, coffee and water as budgets allow. Or invite people to bring potluck items/snacks so food can be shared.

Virtual Meeting Spaces

Some options for when you aren't able to gather face to face:

- [Google Hangouts](#) - free web-based video calls
- [Skype](#) - free web-based calls
- [Free Conference](#) - free conference calls (participants are responsible for their long distance charges)
- [WebEx](#) or [GoTo Meeting](#) - online meeting technology (subscription based)
- Other virtual meeting space options your participants might have access to

Online Sharing Spaces

Some options for collaboratively sharing your learning online:

- [Weebly](#) - easy to set up free websites
- [Google Docs](#) - online collaborative working document
- [Hackpad](#) - online collaborative working document
- [Box](#) or [Dropbox](#) - online collaborative file sharing space

Materials

It is really useful to keep a toolbox of materials for meetings. Here is a suggested list of materials to have on hand for any in-person meetings:

- Marker pens
- Masking tape or wall-safe tape
- Sticky labels for name tags
- Pens
- Coloured pencils
- Paper
- Scissors
- Flipchart paper and flipchart holders
- Scissors
- Post-it notes
- Index cards
- Various materials for the prototyping gathering, such as pipe cleaners, paper, modeling clay, egg cartons, fabric scraps, popsicle sticks, cardboard shapes, small toys and objects from the natural world

It is also handy to have:

- Tibetan or chime bells to get the group's attention
- Wind-up egg timer
- CD/MP3 player and variety of music

Idea Navigator Resources

Additional Resources to Support Idea Navigators

Many resources are available (books, articles, websites, blogs, videos, communities etc.) to support Idea Navigator groups. Here are a few we have noted in our travels with this process.

Resources on Hosting, Personal Leadership and Participatory Methods

- [Circle Process](#), and see also [What is Circle](#)
- [The Art of Powerful Questions](#)
- [The World Cafe](#)
- [Conversational Leadership: Thinking Together for a Change](#) by Thomas J. Hurley and Juanita Brown
- [Collective Story Harvest](#), and see also this quick reference guide to hosting a [Collective Story Harvest](#), and additional resources: [Storyteller Support](#) and small story circle [Host Guide](#)
- [The Work of Byron Katie](#)
- [Reflection Toolkit](#)
- Community: The Structure of Belonging by Peter Block (2009)

Resources on Complexity and Systems

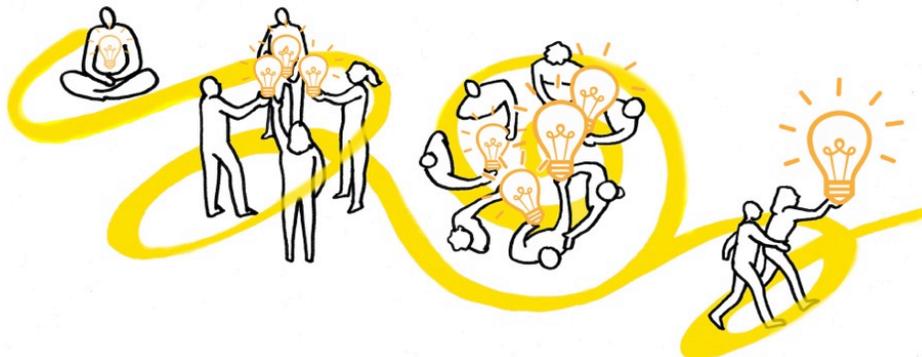
- Theory U [Executive Summary](#), [presentation](#), and [video on Theory U teach](#)
- Harvard Business Review paper [A Leader's Framework for Decision Making](#) by David J. Snowden and Mary E. Boone.
- [Leverage Points: Places to Intervene in a System](#) by Donella Meadows
- Engaging Emergence: Turning Upheaval into Opportunity by Peggy Holman (2010)
- [Article on Engaging Emergence](#) by Peggy Holman
- [Seven Lessons for Leaders in Systems Change](#) from the Centre for Ecoliteracy
- Harvard Business Review Paper [The Work of Leadership](#) by Ronald Heifetz and Donald Laurie
- Leadership On The Line by Ronald Heifetz and Martin Linsky (2002)
- Leadership and the New Science: Discovering Order in a Chaotic World by Margaret J. Wheatley (2006)

Resources on ChangeLabs and Social Innovation Tools

- Various papers and reports on [Social Innovation Labs](#)
- [Adam Kahane video on ChangeLabs](#)
- [Overview of a ChangeLab applied in Calgary on early childhood development](#)
- [Various videos of Canadian ChangeLabs](#)
- Great collection of Lab related links from [MaRS in Toronto](#)
- [Learning Resources for Social Innovation](#) from SiG Knowledge Lab
- [Gamestorming: A Playbook for Innovators, Rulebreakers, and Changemakers](#) by Dave Gray, Sunni Brown and James Macanufo (2010)
- [IDEO Human Centered Design Toolkit](#)
- [Frog Collective Action Toolkit](#)

Inspiring and Catalyzing Videos

- [Margaret Heffernan: Dare to Disagree](#)
- [Stefon Harris: There Are No Mistakes on the Bandstand](#)
- [Steven Johnson: Where Good Ideas Come From](#)
- [Charles Leadbeater: The Era of Open Innovation](#)
- [Ken Blanchard on storytelling and collaboration](#)
- [Dan Pallotta: The Way We Think About Charity is Dead Wrong](#)
- Library of all [TED talk](#) videos
- Library of [Innovation Story Studio talk](#) videos
- [Video presentations from SiG Knowledge Hub](#) (learning resources for social innovation)



About StepUp BC

The non-profit sector contributes as much to this province as traditional sectors such as construction, mining and agriculture—and its greatest resource is its people.

StepUp BC supports British Columbia's non-profit sector in finding creative solutions for attracting, retaining and developing the talent it needs to thrive.

We focus on six key areas:

Developing existing talent. We provide a range of strategies to help non-profit organizations maximize their existing talent.

Recruiting new talent. We help potential candidates see the exciting opportunities a career in the non-profit sector offers.

Preparing for leadership succession. We provide guidance on formal succession planning and long-term sustainability.

Increasing workforce diversity. We support improved representation through greater gender, age, ethnic and cultural diversity.

Ensuring employee satisfaction. We promote the appreciation, recognition and development of varied skill sets.

Telling a new story. We're changing perceptions by spotlighting the non-profit sector as a catalyst for revitalization and growth.

Whether you are leading a non-profit organization, working for one or considering the non-profit sector as a career choice, StepUp BC can connect you to the tools and information you need to succeed.

Learn more at StepUpBC.ca

