

# **VIRTUAL TOP TEAM MEETING PROCEEDINGS**

Offices of ICA Canada/IAF Associates, Inc., Toronto, Canada June 15-17, 2009

## **MEETING PARTICIPANTS**

1. Aida Azadegan (she is doing her PhD at Manchester on quality assessment framework for facilitated collaborations)
2. Danny Mittleman
3. Doug Druckenmiller
4. Eunice Shankland
5. Jerry Mings
6. Jo Nelson
7. Jon Jenkins
8. Sheila LeGeros
9. Wayne Nelson

## **JUNE 15, 2009**

### **AGENDA**

1. Informs presentation
2. Article draft review
3. Finalize structure of ToP Design Patterns: audience, uses
4. Virtual ToP team structure
5. Intellectual property ownership and business model
6. Underpinning ToP philosophy and theory (ToP Essence, Values, Assumptions)
7. Core ToP Design Patterns -- first draft
8. IAF presentation(s)
9. IAF Methods Database
10. How do we engage the ToP community globally? (Key influencers)
11. Second Life and virtual tools
12. ToP Design
13. Integration or synthesis -- add as a step?

### **ARTICLE DRAFT REVIEW**

Doug Druckenmiller is presenting a paper called, "A Pattern Language to Requirements Definition for a Facilitation Database" at the INFORMS conference this week in Toronto. Peter Bootsman has built the IAF Methods Database, and Jon Jenkins has a number of graduate students working on it, and it has 420 facilitation methods listed. There is some confusion in how things are constructed in the database. The contribution process and the way in which people extract methods from it, as well as the editing process will be addressed in its redesign.

They used the collaboration engineering perspective in sorting out some of the different levels to help clarify what is in the database and make it more usable to researchers and facilitators. There is an applications focus, a method focus, and an intervention focus in the IAF Methods Database.

The architecture of the new IAF Methods Database:

# VIRTUAL TOP TEAM MEETING PROCEEDINGS

Offices of ICA Canada/IAF Associates, Inc., Toronto, Canada June 15-17, 2009

- I. An application layer like action planning or participatory strategic planning.
- II. Script layer: there are 6 patterns:
  - A. Generate (brainstorm)
  - B. Organize (cluster)
  - C. Reduce (focusing and prioritizing)
  - D. Evaluate (how good a fit are the ideas with a goal)
  - E. Commit (methods to commit people to actions, used to be called consensus-building)
  - F. Clarify (going from less to more understanding)
  - G. Potentially, there is a 7th script called perhaps integration or synthesis -- going through the wall -- pulling the data and constructing a new idea or knowledge from
    1. There are about 60 different methods that have been documented in generate (brainstorm). The methods have been scripted. There is the tool that is used to go with that, such as Group Systems or ThinkTank. That wrapped together is called a ThinkLet that can be used in a number of different applications.
    2. We're trying to define methods at the script level. There is a many to many relationship between script and application.
    3. We want applications to be entered into the database only when there are scripts to be linked to it.
    4. The "methods level" in the IAF Methods Database need to be reconciled with Design Patterns.
    5. Design patterns can be used to describe 1) methods, 2) interventions, and 3) applications. Design patterns are templates. Right now, there's only one template for all three and that's part of the problem. They would like to have different design patterns for each of the three.
      - a) "Design" is missing from this list -- and we would like to see how to fit it in to the IAF Methods Database.
    6. Thinklets wrap together the Script Layer and the Tools/Configuration Layer. There is a many to many relationship between methods and tools/ configuration layer.
    7. It would be interesting to link cognitive brain theory to this work.
    8. Inputting into the database needs to be done in communities because it is complex.
- III. Tools/Configuration layer -- goes with the method, and today it doesn't include virtual tools.

## DESIGN PATTERNS

- I. For whom are we creating design patterns? Who is the audience?
  - A. For ourselves (in the short-term)
  - B. For our clients (they ultimately benefit)
  - C. ToP trained people around the world
  - D. The practitioners (it lessens the "this is the only way to do things", and enables collaboration).

# VIRTUAL TOP TEAM MEETING PROCEEDINGS

Offices of ICA Canada/IAF Associates, Inc., Toronto, Canada June 15-17, 2009

- E. The people we are training. This will help them.
- F. People ask, "how different is your approach?" We can say, "go to .com and you can see how our approach is different.
- G. The database is for practitioners.
- H. The Thinklets are for programmers. It informs software developers. They are operating in a vacuum at the moment and don't have the rules.
- I. There is a huge range of skills amongst facilitators. 90% are concerned about finding about more techniques.
- J. There are a lot of people who facilitate who don't realize they are facilitating.
- K. This is a documentation and a standardization of the methods. It's a way to communicate the methods beyond the inner circle, and extends the methods to other people.
- L. It enables Larry Philbrook, Kevin Balm to be involved in the creative approach. If we get them involved from the beginning, then we get their buy-in.

## COGNITIVE PATTERNS

Your brain is doing one function, and then your brain turns and does another kind of thinking. Sometimes it's like ORID, where you change levels. For example, in design, the basic cognitive pieces are:

- Listening and probing and drawing out information from the client (downloading)
- Clarifying the core outcomes and the real overarching focus (integrative synthesis)
- Finding the turning point in the process (if we get to this point, where will it be downhill)
- Organizing the thought process the group needs to get to the outcomes
- Plot methods and time to the thought process
- Test the design

The new science -- human systems dynamics. When you facilitate, how do you communicate that it is not an individual process to keep the process open for what emerges out of left field? The new physics.

Chaos theory -- the more diversity you have, the more patterns you have. Then, it becomes difficult to name the group when there's too little data in the column. So, then, we need to merge columns.

There are five or six laws in gestalt psychology that were used to evolve the Consensus Workshop Method.

## DESIGN PATTERNS FOR CONSENSUS WORKSHOP

We reviewed the basic design patterns for consensus workshop and began writing second drafts.

# **VIRTUAL TOP TEAM MEETING PROCEEDINGS**

Offices of ICA Canada/IAF Associates, Inc., Toronto, Canada June 15-17, 2009

## **UNDERLYING PHILOSOPHY OF TOP**

This course, taught in Canada, contains many of the underlying theories or philosophies of ToP, "Human Development: Foundations for working with changing behavior." What's missing is the contradictions thinking piece. Duncan knows about this.

## **IAF PRESENTATIONS**

1. Do a real face-to-face workshop and a virtual workshop and have the group compare and contrast them.
2. Global virtual IAF plenary session.
3. Teach people how to design a virtual workshop and have them design and do one.
4. Teach people how to do design patterns for their own methods and then have them do them and key them into the IAF Methods Database.

## **TEAM TELECONFERENCE JUNE 15**

What are the trade-offs you make when choosing a variant of a design pattern? When you're designing with a client, or adjusting midstream, you can say, "yes we can do that, but this is what you're going to lose." Your equation not only should be technically correct, but it should be beautiful.

Like architects we need to have the conversation about the trade-offs between cost/time/quality with clients. For example, level of consensus is an aspect of quality. We never define quality. The quality is the ability of a product to meet the design requirements of the client. Cost: economics of the decision -- the capital or investment cost, the opportunity cost, the exit cost. Time: the time of the group, the intended duration of the product.

Tomorrow we'll work on naming and resolve. We'll post our documents on Huddle and ask the group to react.

## **JUNE 16, 2009**

Doug said that Jon and Danny would like to scale back work on the IAF Methods Database. We decided it's immaterial to our work as a task force.

Doug proposed that Danny and Doug create a site in SecondLife for our team to collaborate. IBM has a sticky wall and there are collaboration tools available. We can join the team created by ICA Associates by going to "Search>Groups", and look for "ToP Dialogue".

Let's have Jerry do training to the group on setting up avatars, profiles, selecting our appearance and clothes. We can buy our own island and define who can come in. New Media Collaboration (NMC) is a place where we can create our own meeting space. \$700 / year plus set-up fee.

# VIRTUAL TOP TEAM MEETING PROCEEDINGS

Offices of ICA Canada/IAF Associates, Inc., Toronto, Canada June 15-17, 2009

We created Design Patterns for Clustering, Naming and Resolve, and innovated the Design Pattern template so that it contains the core blocks of the pattern and variances may be captured in a way that indicates the situation where the variance is appropriate and the benefits and the consequences of the variance.

Doug explained that what we have done is followed "The design of an inquiring system". (From Descartes to the 20th century.) A consensus of truth. A community of consensus articulates what the truth is. Whatever truth you have has to be consistent, and it explains your experience. Kantes observed that it's possible to have multiple views of reality that is both internally consistent and has a community that subscribes to it. Hegel observed that it's possible to have diametrically opposed groups. A third view takes the thesis, the antithesis and the synthesis, and that truth is a process of formulating a thesis, an antithesis, and a synthesis. Kierkegaard called this Hegel's ladder to heaven (to the true and the beautiful.) This ended in Singer -- there are not just two perspectives that combine together to form the truth. There are actually multiple explanations, and at any moment the task is to sweep all these perspectives in to a single gestalt. As soon as you go up one level or down one level in your abstraction, you have to start all over again.

Doug has a scenario planning tool, but lacks the facilitation scripts that go along with it. STELLA is systems dynamics modeling, but you need a systems dynamics modeler to use it. The tool Doug has allows people who are not good at math to do the modeling and then simulate the math so that the group can see the expected results and iterate the model until they're satisfied.

Requirements engineering -- rational process for using Thinklets to design requirements. IBM is open source in SecondLife, and it looks like we can get a copy of the tool set and get into a sandbox. Once we get into there and familiar, then we start to get into tools and talk about the affordances they have, and then as a last resort we go to custom tools.

Privacy is an issue for virtual teams, and for SecondLife. Indemnification is an issue, especially if they want to hold you, the facilitator accountable.

Who do we need to get permission from in order to publish our work? Somebody has to be the source. It can be a group or an individual. We created a lot of intellectual property, but if somebody claims it without the rest of us we run into trouble. What does an open source approach look like? We give ICA Canada a copyright and they distribute it under a general public license and you can use it but you use it for free if you always credit it as ICA Canada as the copyright holder, and as long as you distribute it for free also. A danger is that if we get this into a client's hands before we copyright it, they can take it and say it's theirs and we have no right to use it anymore.

General public license is a way of protecting property that enables collaboration and makes what we do distributable in a controlled way.

# VIRTUAL TOP TEAM MEETING PROCEEDINGS

Offices of ICA Canada/IAF Associates, Inc., Toronto, Canada June 15-17, 2009

We talked about saying that ICA Canada owns it, and it is distributed under a General Public License (go to [www.gnu.org](http://www.gnu.org)). The practice is to lock it down by the conference is. Then all the proceedings in that locale can be referenced. If I reference it in a paper, I need a source to reference it. Copyright is essential to collaboration.

Copyright doesn't say anything about licensing. Licensing and copyright are two different things. We must copyright everything because it says who created it, so that it can be referenced. We need to declare this as a conference and publish proceedings from the conference, and declare a joint copyright such as ICA Canada, ICA USA and TTN. We can't turn around and make profit from these materials, that we sell, without permission from the copyright holder. For example, ICA Canada could get 10% royalty for it, or ICA Canada could say that we have to generate the materials for free and sell the training. The benefit is that the copyright holder is protected.

An example is that the TTN Denver meeting should have created a copyright of its conference proceedings so that they could be referenced later on by us.

TTN, when it becomes an entity, could become a copyright holder in the future. This is a key concept that we need to take care of in the future. We need to make use of tools and copyrights so that it can be sourced and referenced in subsequent documents and papers. What you do is:

- List the participants in the proceedings. Acknowledge all the right people.
- Make sure there is a document of record from Denver and from Toronto, and you can have a sense of all of these meetings.

The creative commons is an intentional architecture for managing intellectual property and your collaboration.

The challenge is that it becomes difficult at a point to reference individuals. In an academic conference, there are often multiple authors on a particular paper, and the conference itself publishes the proceedings. We reference it as the title of the article, written by these authors, from this conference. In a collaboration like we're doing it's very hard to pin down the originator of all the ideas. So you have to attribute it not to any one person, but we all have the right to have benefit from it.

In a sense it doesn't matter who holds the copyright. ICA Canada already has a policy that you can use it so long as you attribute it and reference it properly, and you do not sell it. And, if you're going to make money off of it, then you have royalties that come back to ICA Canada. (We decided it's better not to talk about selling and royalties at this time.) We could have an agreement that whatever meeting we have, then we publish the proceedings as coming from the entity of that meeting. We could post all documents on the Huddle, and say that it's a virtual conference that's an ongoing affair, and then it's "published".

# VIRTUAL TOP TEAM MEETING PROCEEDINGS

Offices of ICA Canada/IAF Associates, Inc., Toronto, Canada June 15-17, 2009

Conclusions:

- 1) We got close to being in the place where we ask ICA Canada to be the copyright holder, of our work at this proceedings and all the work done until this point. The benefit of ICA Canada is that they are already operating as an open source, and they are existing and have a track record. We need to gain the alignment of the full team, and make sure we've thought through all the implications. We'll continue the conversation tomorrow.

Copyright Reference:

<http://www.gnu.org/philosophy/nonsoftware-copyleft.html#what>

## **JUNE 17, 2009**

Aida, a PhD student at Manchester University in England joined our team today. She was a presenter at the INFORMS conference in Toronto.

## **DESIGN PATTERNS**

We finalized our Design Pattern template for our work, and Wayne will post it to the Huddle. Essential Steps are the universal core of the pattern.

Danny and Doug committed to create an online design pattern database for us.

This is a potential site where we could store a database of design patterns, and ICAI is the owner of this site, and Wayne Nelson is the webmaster:

<http://www.topfacilitation.net/>

The application design pattern framework will be based on and very similar to the method design pattern.

Definition of a variant: you have a new approach to doing a step. A variant is not defined by asking a different set of questions. Examples of variants:

- Create 35 to 45 cards in a consensus workshop.
- Create 35 and 60 in a consensus workshop.
- The facilitator is actively leading the clustering.
- The facilitator is completely neutral in the clustering.
- Tag clusters after 3 cards are posted.
- Never tag in a consensus workshop.

# VIRTUAL TOP TEAM MEETING PROCEEDINGS

Offices of ICA Canada/IAF Associates, Inc., Toronto, Canada June 15-17, 2009

## NEXT STEPS

Description	Who	Date
1. Design Patterns: create the first two pages of the design pattern template in an online tool.	Doug Druckenmiller Danny Mittleman	Estimated completion date: prototype ready by mid-July for the team to test and then make changes.
2. Assignments for documenting at a high level the 5 core design patterns of consensus workshop (the design pattern proceedings of this meeting).	Set Context -- Eunice Shankland Brainstorm -- Eunice Shankland Cluster -- Jerry Mings Name -- Sheila LeGeros Resolve -- Sheila LeGeros	Complete first draft for team to review by the end of June. Post it in the Huddle.
3. Clean-up the design pattern detailed instructions based on our proceedings.	Wayne Nelson	
4. Create application design pattern template.	Wayne Nelson	
5. We shall get a more current list of "patterns of collaboration" from Danny, and then the team will evaluate whether that list of patterns of collaboration works, or needs to be expanded. Sheila to review it with the team. Sheila to revise instructions so it's clear to me. Get it reviewed by the team and approved	Sheila LeGeros	By the end of the month



# VIRTUAL TOP TEAM MEETING PROCEEDINGS

Offices of ICA Canada/IAF Associates, Inc., Toronto, Canada June 15-17, 2009

Description	Who	Date
6. Virtual ToP Team adds variants to the online design pattern database.	Virtual ToP Team	End of August
7. Global ToP Trainers Network adds variants to the online design pattern database. September -- open it up		Open it up for data entry in September
8. Do application design patterns	<ul style="list-style-type: none"> <li>a. Wall of Wonder -- Eunice Shankland &amp; Sheila LeGeros</li> <li>b. ToP Design -- Jo Nelson</li> <li>c. Strategic Planning -- Wayne Nelson</li> </ul>	
9. Ask the Knowledge Team to begin working together with the Technology Team, and have them review and comment on our design patterns.		
10. June 29th, 7:30 PM -- 9:00 PM we'll have a joint team (The Virtual Team) meeting to: Report on the proceedings of the Toronto meeting, get an update on subject matter expert interviews		

# VIRTUAL TOP TEAM MEETING PROCEEDINGS

Offices of ICA Canada/IAF Associates, Inc., Toronto, Canada June 15-17, 2009

Description	Who	Date
11. Sheila to write an IAF proposal to involve the whole team in a pre-conference event, and circulate it to the team for review, and submit it by June 19th.	Sheila LeGeros	June 19
12. Doug and Danny to write an IAF proposal for a pre-conference.	Doug Druckenmiller Danny Mittleman	June 19
13. Building a SecondLife sandbox has cost implications that the business model team needs to consider. We might consider using the DePaul site, the Manchester site or the Omaha site. Doug and Danny will investigate this question for us.		
14. Aida will investigate scheduling a place for us to meet in the Manchester site (as a starting location.)		

## INTELLECTUAL PROPERTY

Another possibility is to have ICAI be the copyright holder of our intellectual property. Doug had a conversation with Nelson Stover about this idea and he open to that. We recommend that a cross-organizational task force be created to work on this question. Until this is decided by the task force, then we'll use ICA Canada as the copyrighting organizational for our work on a temporary basis, and we'll follow creative commons guidelines.