

# Nexus: Pittsburgh Dialogues for Volunteers, Philanthropists, and Activists

## Group Facilitation for Nonprofit Leaders\*

September 2007

### CONTENTS

Nonprofit Leaders as Facilitators.....	1
About this Guide.....	2
FOUR METHODS OF GROUP FACILITATION .....	3
WORLD CAFÉ.....	3
STORY CIRCLES.....	5
SCENARIO THINKING.....	8
OPEN SPACE MEETINGS.....	11
CONCLUSION.....	13

### NONPROFIT LEADERS AS FACILITATORS

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More and more nonprofits are adopting a facilitative style of leadership. Nonprofits rely upon a wide array of resources to serve communities effectively. Volunteers, community groups, government agencies and charitable organizations all have important contributions to make in bringing about community change. Yet in most communities no formal system exists for coordinating these resources. Instead nonprofit leaders must draw upon the

“power of inclusion, and the power of language, and the power of shared interests, and the power of coalition.”<sup>†</sup>

Facilitative leadership is the key to unleashing these powers. It is based on the assumption that each person or group holds an important piece of the larger puzzle. Effective facilitators are able to

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<sup>†</sup> Jim Collins, *Good to Great and the Social Sectors* (Jim Collins, 2005) p. 10.

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bring out the best abilities of each in order to generate creative solutions for all and build the commitment necessary to implement those solutions.

## ABOUT THIS GUIDE

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This guide introduces four methods of group facilitation that nonprofits can use to engage volunteers, staff, board, and community members in planning for the future. The Bayer Center for Nonprofit Management at Robert Morris University, Pittsburgh, Pennsylvania, tested each method - The World Café, The Story Circle, Scenario Thinking, and Open Space Meetings - during a rigorous 18 month process called the Nexus Dialogues.

Between January 2006 and April 2007, four Nexus Dialogues were held on critical issues facing nonprofits in southwestern Pennsylvania. Each dialogue involved a public presentation by a national thought leader followed by a workshop utilizing one of the four methods.

### **NEXUS GUIDING QUESTIONS**

**WHAT FACTORS CAUSE PEOPLE TO BECOME ENGAGED CITIZENS?**

**ARE THERE CULTURAL TRENDS THAT ENCOURAGE ENGAGED CITIZENSHIP?**

**ARE THERE TRENDS THAT DISCOURAGE ENGAGED CITIZENSHIP?**

**WHAT PRACTICAL STEPS CAN COMMUNITIES TAKE TO STRENGTHEN CITIZEN ENGAGEMENT?**

**DO NONPROFITS HAVE A SPECIAL ROLE TO PLAY IN FACILITATING CITIZEN ENGAGEMENT?**

Thirty five to 40 people participated in each workshop. The majority was employed in the nonprofit sector (83 percent) and nearly all (89 percent) identified themselves as regular volunteers.

The Bayer Center and its partner, the Richard King Mellon Foundation, viewed the Dialogues as a vehicle for building confidence in the nonprofit sector and engaging communities in nonprofit work. Research conducted in 2003 in Allegheny County Pennsylvania indicates that residents and nonprofit professionals often do not agree on the needs and priorities facing their communities or on the best ways

to improve community capacity to meet those needs.<sup>‡</sup> Residents are unsure if nonprofits are addressing problems that are important to them and their communities. When people do not have confidence in nonprofits, they give less of their time and money to support nonprofit work.

The Nexus dialogues aimed to identify challenges underlying the issue of confidence. As described in the next section, each method of facilitation structured the dialogue in a different way and brought unique advantages to the engagement. But there are good reasons to use any of the group facilitation methods featured in this guide:

## **WHY USE GROUP FACILITATION METHODS?**

**TO ACCELERATE ACTION**

**TO INCREASE SHARED UNDERSTANDING AND OWNERSHIP OF ACTIONS**

**TO CREATE EMOTIONAL ATTACHMENT TO OUTCOMES**

**TO ENSURE SUSTAINABILITY OF OUTCOMES**

**TO ENHANCE MANAGEMENT EFFECTIVENESS**

Included in the guide is a brief definition of each method, a description of the steps involved in putting the method into practice and a summary of the context of its application in the Nexus Dialogues. Additional resources on each method are also listed and should be referred to before selecting a method for an event you are planning.

## **FOUR FACILITATION METHODS**

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### **1. THE WORLD CAFÉ**

#### **THE WORLD CAFÉ DEFINED**

**T**he World Café format is based on historical evidence that new ideas are developed and refined through informal conversations in cafes, salons, pubs, kitchen tables, and places of workshop. The World Café

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<sup>‡</sup> This research is summarized in Gregory J. Crowley, *Why Trust Matters to Nonprofits* (Robert Morris University, January 2006), found at [http://www.rmu.edu/SentryHTML/pdf/bcnm\\_nexus\\_trust.pdf](http://www.rmu.edu/SentryHTML/pdf/bcnm_nexus_trust.pdf)

brings people together in an informal environment to discuss issues and questions of importance to their communities. The key to Café learning is "idea cross-pollination." Tables are arranged in the event space to create a casual café feeling, with each table hosting a different topic of conversation. Participants move from one table to the next, sharing their ideas about each topic as well as the insights they have gained from discussions on prior topics. In this way, participants discover shared meaning, they gain new perspectives on the things that matter most to them, and they create new possibilities for acting together.

## **APPLICATIONS**

**MOVING TEACHERS AND ADMINISTRATORS FORWARD TO IMPROVE ACADEMIC PERFORMANCE IN A SCHOOL DISTRICT**

**PLANNING TO IMPROVE MARKET SHARE OR LAUNCH NEW PRODUCTS IN A CONSUMER PRODUCTS COMPANY**

**EXPLORING WHAT VALUE PEOPLE DERIVE FROM MEMBERSHIP IN AN ASSOCIATION**

## **WORLD CAFÉ IN PRACTICE**

Participants in a World Café are divided into groups of four to five people. Each group is seated at a different table representing a specific topic. Participants write directly on paper tablecloths their ideas, insights and questions relevant to the table's topic.

Table discussions occur over a period of 20-45 minutes. At the end of each discussion, a new round begins. One person

remains with the table as host, while others move to a new table to discuss a new topic. The host shares the essence of the previous group discussion with newcomers, who in turn convey any highlights or themes carried from the previous round.

At the end of the World Café participants have absorbed ideas generated from various groups and have a written record of their work. The method is useful for organizations seeking to identify priorities and concerns in communities they serve. It is also useful for building stronger social networks within the community and between communities and non-profits.

The World Café is a highly open-ended process that is best suited for beginning exploration of issues. Workshop results can then be followed up with more focused planning efforts. It is therefore important to define key topics that can inspire participants to remain engaged over the long term.

## NEXUS WORLD CAFÉ, DOWNTOWN PITTSBURGH, JAN 31, 2006

The Bayer Center prepared for the Nexus workshop series by publicizing the findings of existing research and hosting open dialogues facilitated by national thought leaders. Invitations were sent to Bayer Center clients and volunteers as well as charitable foundations. Included in the invitations were the session theme and four guiding questions of Nexus.

The goal of the Nexus World Cafe was to stimulate focused discussion on the four guiding questions and to encourage participants to continue the conversation in their organizations. Success was measured in the degree to which relationships developed among participants led to efforts at more focused discussion in the future.

*"In selecting participants for the World Café, we looked for connectors, people who would go back and continue the conversation in their organizations and communities."*

*-Peggy Morrison Outon, Nexus World Cafe facilitator*

## ADDITIONAL RESOURCES

Brown, Juanita, D. Isaacs, and the World Café Community, *The World Café* (Berret-Koehler Publishers Inc., 2005)

Brown, Juanita, Ken Homer, and David Isaacs, "The World Café," pp. 179-194 in *The Change Handbook*, 2nd edition, edited by Peggy Holman, Tom Devane, and Steven Cady, San Francisco: Berret-Koehler, 1997.

*The World Café*, found at <http://www.theworldcafe.com>

## 2. STORY CIRCLES

### STORY CIRCLES DEFINED

Story Circles use the ancient tradition of storytelling to deepen people's understanding of their own communities while strengthening their relationships with others engaged in change efforts. In a Story Circle people gather in small groups to reflect upon and learn from the experiences of others. When people share personal experiences in the

form of a story, listeners anticipate that it will make a larger point, one that is relevant to their own lives. In this way, storytelling enables people to learn about their own communities while at the same time identifying shared concerns and establishing common identity. Storytelling is also an effective way to build trust between people, since the narrative form prepares listeners to listen empathetically.

Story Circles evolved in the 1980s from the work of two community-based organizations in the metro Denver region, Metropolitan Organizations for People (MOP) and Project WISE. MOP consists of 22 congregations, schools and neighborhood associations with a mission of empowering people to strengthen and transform their communities through organizing. Project WISE is a women's initiative that aims to empower low-income women to meet goals for themselves, their families, and their communities. Story Circles have also been used in community arts organizations such as Theresa Holden's Artist and Community Connection. Holden has facilitated Story Circles across the country for local arts organizations seeking to "equalize all partners' voices in the planning, development and outcome of each project."

### **PARTICIPANT GUIDELINES**

**SIT IN A CIRCLE AND MOVE AROUND THE CIRCLE IN RESPONSE TO A FOCUS TOPIC CHOSEN FOR THE SESSION**

**STORIES MUST BE BASED IN PERSONAL EXPERIENCE**

**LISTEN TO OTHER PEOPLE'S STORIES WITHOUT INTERRUPTING**

**AGREE ON A TIME LIMIT FOR STORIES**

**IT IS NOT NECESSARY TO SPEAK ON YOUR TURN**

**RESPECT THE "CONFIDENTIALITY" OF PARTICIPANTS' STORIES**

### **STORY CIRCLES IN PRACTICE**

#### **Gather in Small Groups**

People are inspired to come together out of shared interest in a problem or issue. The Story Circle is well suited for instances when people who may share problems or opportunities have yet to come together to define their common ground. The narrative format creates an environment that invites and enables equal participation from every person and reveals valuable information held in people's memories. Participants break into groups of 4-6 people.

#### **Story Circle – Focus Topic**

Before beginning a session, participants identify a topic to focus the storytelling. The scope of a topic will vary depending upon the purpose it is intended to serve. Participants take turns responding to the focus topic in their small groups.

## **Story Circle – Reflection**

The small groups reflect upon responses to the focus topic, discuss common threads, and summarize lessons learned.

## **Action Steps**

The groups discuss what actions they can take based upon the lessons learned.

### **NEXUS STORY CIRCLE, EAST END OF PITTSBURGH, APRIL 4, 2006**

In the wake of Hurricane Katrina, residents of New Orleans became significantly more engaged in their communities. The Bayer Center invited several community leaders from New Orleans to address a Pittsburgh audience on how the Katrina cataclysm transformed local community life. The follow-up Nexus Story Circle workshop was intended to build on this event to promote learning directly from the experiences of nonprofit managers, volunteers, activists, and philanthropists in Pittsburgh.

*Focus topic:* Talk about a time in your life when you became aware that you were part of a community.

*Reflection:* What did the stories in your group have in common? How were they different? What have we learned about how to get more people involved?

*Action:* What can you do to make people feel a part of your organization or community?

*"Stories encourage listening; When we listen we learn."  
-Theresa R. Holden, Story Circle facilitator*

## **ADDITIONAL RESOURCES**

Randels, Jim, "After the Storm," *Teacher Magazine*, January 2007, at [http://blogs.edweek.org/teachers/randels/archives/2005/10/the\\_story\\_circl\\_1.html](http://blogs.edweek.org/teachers/randels/archives/2005/10/the_story_circl_1.html)

*Story Circle Model (In Depth)* People's Organizing Committee, at <http://www.peoplesorganizing.org/Volunteer/The%20Story%20Circle%20Model.doc>

*Story Circle Tool Kit*

<http://www.makingconnectionsdenver.org/publications/uploads/66/StoryCircleToolkit.pdf>

### 3. SCENARIO THINKING

#### SCENARIO THINKING DEFINED

Scenario Thinking is a powerful way to prepare organizations and communities to respond effectively to potential opportunities and threats. Thinking in scenarios is fundamentally a process of identifying forces of change in the world - such as shifting roles of government or the development of new technologies - and critically analyzing how these forces could combine in different ways to affect the future of an organization or community.

Since the early 1980s, Global Business Network (GBN) has developed and refined the Scenario Thinking process for use in private sector organizations. Beginning in 2001, with support from the David and Lucile Packard Foundation, GBN has been raising awareness of Scenario Thinking in the nonprofit sector.

#### APPLICATIONS

**YOUR SITUATION IS IDEAL FOR SCENARIO THINKING IF:**

- THE SOLUTION TO A STRATEGIC ISSUE IS UNCLEAR**
- THE ENVIRONMENT IS UNCERTAIN**
- THE ORGANIZATION OR COMMUNITY IS OPEN TO CHANGE**
- THERE IS LEADERSHIP SUPPORT FOR THE SCENARIO THINKING PROCESS**

#### SCENARIO THINKING IN PRACTICE

Scenario Thinking is organized in five-phases: pre-work, exploration, synthesis, action, and monitoring.

##### **Pre-Work**

Interviews are conducted with key stakeholders in order to clarify the purpose for entering into a Scenario Thinking exercise. Among the topics probed in interviews is the timeframe for scenario thinking. For how many years into the future is the organization preparing itself? Other interview topics focus on how internal and external environments of the organization

are changing over time and the implications of these changes for long-term strategic decisions.

Having learned from the interviews about challenges and underlying assumptions, the organization begins to frame the focus topic that will orient the Scenario Thinking process.

## **Exploration**

Exploration is the first phase of Scenario Thinking that is facilitated in a group workshop. The workshop could be conducted in a few hours, but is best done in a one-day retreat or several 2 to 3 hour sessions. This ensures that ample time and consideration will be given to the development of scenarios facing the organization.

In the first part of the workshop, participants break down into small groups of 6 to 10 people to explore and document various forces that could shape the focus topic, such as changing social values, developments in technology, and shifting roles of government.

## **Synthesis**

After identifying and evaluating several forces of change, the next step is to integrate them into plausible scenarios. This process begins by prioritizing forces according to their relevance to the focus topic and the level of uncertainty surrounding the forces. The idea is to arrive at a small handful of driving forces and then to combine them into scenarios that seem most likely to occur.

## **Action**

Articulating several plausible scenarios clarifies the decisions and actions available to an organization. The outcome could be an organizational commitment to a specific course of action or the identification of areas in need of greater research and exploration. Whatever the case may be, stakeholders will be better able to make decisions that yield desirable outcomes.

## **Monitoring**

In this phase mechanisms are created to help the organization or community track changes in the environment to adjust strategy according to the actual scenario that is unfolding.

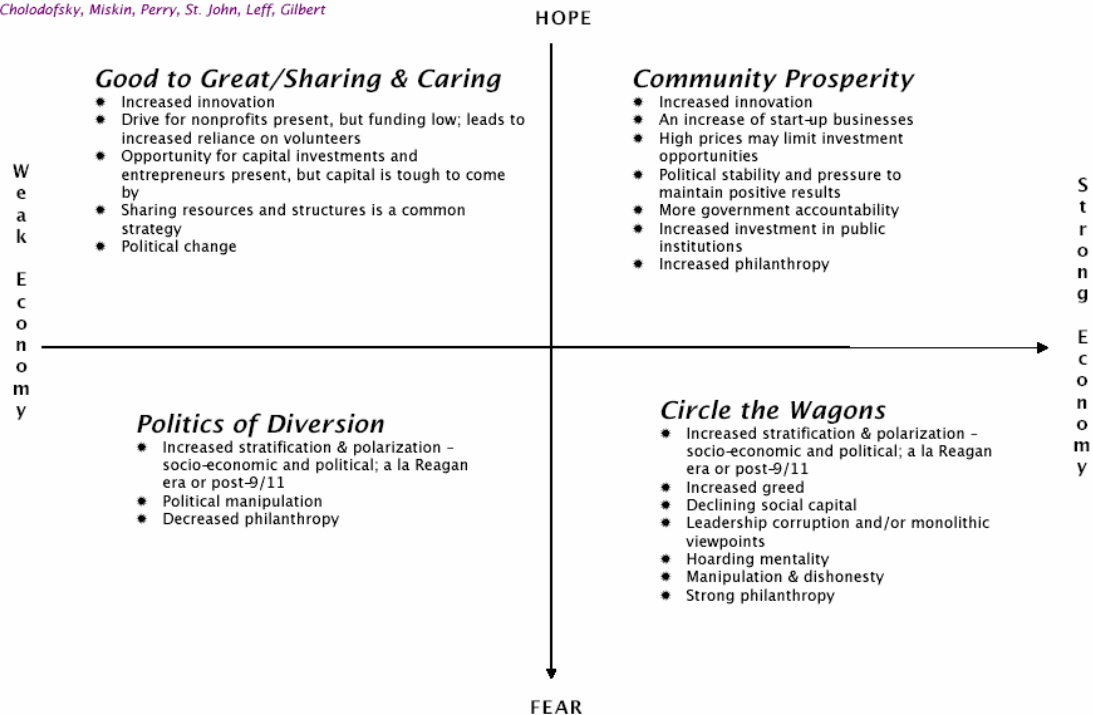
**NEXUS SCENARIO THINKING, EAST END OF PITTSBURGH, NOVEMBER 7, 2006**

*Focus topic:* How can nonprofits promote collaboration among themselves and with business and government to achieve common goals?

*Driving forces:* Groups identified different forces as relevant to the future of cross-sector collaboration in the Pittsburgh region. Below is one group's scenario. It indicates that the future of collaboration depends upon the strength of the economy as well as how hopeful people feel about the future.

## EXAMPLE OF SCENARIO MATRIX FROM THE NEXUS WORKSHOP

*Cholodofsky, Miskin, Perry, St. John, Leff, Gilbert*



*"Scenario Thinking is about preparing ourselves to respond proactively to changes in our situation"*  
*-Peggy Morrison Outon, Nexus scenario thinking facilitator*

### ADDITIONAL RESOURCES

Ertel, Chris, Katherine Fulton, and Diana Searce, "Scenario Thinking," pp. 331-346 in *The Change Handbook*, 2nd edition, edited by Peggy Holman, Tom Devane, and Steven Cady, San Francisco: Berrett-Koehler, 1997

Searce, Diana, Katherine Fulton, and the Global Business Network Community, *What If?* (Global Business Network, 2004)

## PRINCIPLES

**WHOEVER COMES ARE THE RIGHT PEOPLE** – IT IS NOT HOW MANY PEOPLE OR THE POSITIONS THEY HOLD THAT COUNTS, BUT PARTICIPANTS' PASSION FOR THE SUBJECT

**WHENEVER IT STARTS IS THE RIGHT TIME** – MOTIVATION AND CREATIVITY DO NOT HAPPEN ACCORDING TO THE CLOCK.

**WHEN IT'S OVER IT'S OVER** – THE SESSION ENDS WHEN THE WORK IS FINISHED, WHETHER IN 10 MINUTES OR TWO HOURS

**WHATEVER HAPPENS IS THE ONLY THING THAT COULD HAVE** – THE GROUP MUST ACT ON WHAT ACTUALLY HAPPENED, REGARDLESS OF WHAT SHOULD HAVE HAPPENED

## 4. OPEN SPACE MEETINGS

### OPEN SPACE MEETINGS DEFINED

Open Space is a method by which participants determine for themselves the outcomes, agenda, and length of a group discussion. It is useful in facilitating dialogue about highly uncertain issues among people who may not know one another.

In the 1980s management consultant Harrison Owen created Open Space as a "marketplace of inquiry" where people organize discussion on topics that matter to them. Open Space Meetings unfold without restrictions or expectations as to the outcomes.

Owen first used the approach in response to a major shutdown of the Rockport Company. The

company's employees had all gathered in a warehouse, but no agenda had been set and no plans for action had been made. Owen read his four Open Space principles (see box above) and within 30 minutes employees had taken ownership of the meeting and were defining an agenda for themselves.

### OPEN SPACE MEETINGS IN PRACTICE

As with the other methods, Open Space is guided by a topic of focus that must grab the attention of participants so as to jumpstart a discussion. The topic for Rockport employees was exemplary – they needed to decide what to do about the plant closing. Once the discussion begins, participants who are truly committed will determine its course and outcomes. Six guidelines are followed:

- Participants sit in a circle and a facilitator invites them to suggest issues on which they would like to take action
- Participants write their issues on paper, announce them to the group, and post them on the wall
- After all issues are on the wall, the facilitator invites participants to sign up for the issues they most want to explore

- Issues are assigned times and meeting locations
- Participants meet in self-managing groups to discuss the issues
- Participants are free to visit other groups to facilitate cross-pollination

After results of the meeting are documented, groups convene again to prioritize issues and set timelines for action.

### NEXUS OPEN SPACE MEETING, EAST END OF PITTSBURGH, MARCH 13, 2007

The Nexus Open Space meeting was structured around a visit from Allison Fine, author of *Momentum: Igniting Social Change in the Connected Age* (2006).

*Focus topic:* How do we embrace the use of new social media (email, web, blogs, pod casts, wikis) to increase participation in social change efforts?

*Agenda created by participants:*

- Bridging the Digital Divide: Generations, Technology and Gate-keeping
- Access to Info = POWER
- Focused Vision vs. Dilution by Inclusion
- Isolation, Individualism, and Virtual Relationships
- Old World Skills, Brave New Formats
- The Un-meeting Groupthink
- Capturing and using web-based data to market and communicate

*"Open Space meetings allow the convener to see where the energy and concern are in their organization or community."*

*-Luci Dabney, Nexus Open Space facilitator*

### ADDITIONAL RESOURCES

Herman, Michael, "Working in Open Space: A guided Tour" at [www.openspaceworld.org/cgi/wiki.cgi?WorkinginOpenSpace](http://www.openspaceworld.org/cgi/wiki.cgi?WorkinginOpenSpace)

Owen, Harrison, *Open Space Technology: A User's Guide*, 2d ed. San Francisco: Berret-Koehler, 1997.

\_\_\_\_\_. "Open Space Technology," pp. 135-148 in *The Change Handbook*, 2nd edition, edited by Peggy Holman, Tom Devane, and Steven Cady San Francisco: Berret-Koehler, 1997.

## CONCLUSION

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More than 500 people participated in the Nexus exploration of public confidence in the nonprofit sector. They learned that the problem of nonprofit confidence is complex and that solutions must be sought at multiple levels. This guide represents one set of practical strategies that can be implemented relatively easily by nonprofit organizations. It does not take new legislation, more government funding, or widespread changes in public attitudes for an organization to begin facilitating group discussions as a way of building public confidence in its work. As more nonprofits adopt a facilitative style of leadership, confidence in the nonprofit sector as a whole can improve. This is the hope of the Nexus Dialogues.