Vision in Formation: "Articulating Your Community's Purpose"

Facilitator's Guide

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Background

This guide was produced by the Educopia Institute as part of our [Community Cultivation](#) support and infrastructure. Our Community Cultivation efforts provide scaffolding and tools that help support and sustain collaborative groups, communities, and organizations. Building on the [Community Cultivation Field Guide](#), this is the first in a series of open access Community Cultivation tools, templates, and guidance documentation that we are publishing to help communities navigate common challenges encountered as they are forming.

Credits and Licensing

This guide and its accompanying templates were co-produced by Jessica Meyerson, Katherine Skinner, Hannah Ballard, and Terra Graziani, with input and editorial support from Lauren Dapena Fraiz, Brandon Locke, Nancy Adams, Caitlin Perry, Jessica Farrell, and Hannah Wang. Materials herein are distributed CC-BY. Attribution can be credited: "Vision in Formation: Articulating Your Community's Purpose," *Community Cultivation - Resource Library*. Educopia Institute, 2021.

Introduction

> **Reaching & maintaining alignment around common needs, activities, & opportunities is perhaps the most critical challenge faced by new communities...**

Reaching and maintaining alignment around common needs, activities, and/or opportunities is perhaps the most critical challenge faced by new teams, communities, networks, and organizations during the Formation lifecycle stage. This facilitator's guide, "Vision in Formation: Articulating Your Community's Purpose," is designed by Educopia to help nascent communities address this challenge. This guide includes instructions for planning a structured activity and templates to support this work. Using these resources, a facilitator (community manager, project director, or other convener) can guide the initial members of a new community or network to articulate and document the shared purpose of their collaboration. This guide may also be helpful for existing communities that are in transition and reconsidering their shared purpose.

"Vision in Formation: 'Articulating Your Community's Purpose'" is the first facilitator's guide in a free series of facilitator guides included in Educopia Institute's "Community Cultivation" resources. Additional resources, including the Community Cultivation Field Guide are freely available at educopia.org/cultivation.

Planning and Preparation

Ideal Participants and Setting

The activity outlined in this guide is designed to be used by a facilitator with the key stakeholders, partners, collaborators, and/or team members who are establishing a community *or* who are key voices within an existing community. The setting could be a virtual meeting platform (e.g., Zoom) or an in-person meeting space.

Materials and Set-Up

This guide provides context, planning considerations, facilitation instructions, templates, and examples for a group activity that Educopia uses often to help groups articulate or rearticulate their shared purpose. We recommend that a facilitator schedule multiple (2–4) sessions to complete the activity, and we recommend that these sessions include as many of the effort's key stakeholders, partners, collaborators, and/or team members as possible. If the group is larger than 10 individuals, we highly recommend using a combination of plenary sessions and breakout small-group activities (in person or virtual) to keep individual voices engaged.

Facilitator Resources

Templates in this Guide

Link to email invitation template
Link to example survey
Link to meeting agendas template

External Resources

The following resources may help to further prepare a facilitator for this activity, including designing meeting sessions and forming a deeper understanding of the broader topical area. All resources below are free to access and use.

- Anti-Oppressive Facilitation for Democractic Process - This facilitation guide, created by members of the Anti-Oppression Resource & Training Alliance (AORTA), is a *foundational resource* for anyone who is facilitating a group for the first time - and is a grounding, evergreen resource for seasoned facilitators as well! The guide starts by defining what effective facilitation is all about and what the role of a facilitator is. The guide also covers community agreements about norms and accountability for upholding them, considerations for the culture you will help to create as a facilitator, the value of real-time synthesis and mirroring back to the group, decision making, common mistakes, and specific tools for addressing power imbalances and dynamics within a group.

- Facilitation Strategies - This resource, paired with the AORTA guide described above, are essential reading for anyone playing a facilitation role. Similar to the AORTA guide, the resource starts by defining facilitation and the role of the facilitator. The rest of the resource includes a list of eight facilitation strategies and detailed descriptions of what they mean and how to apply them. These strategies range from “developing group agreements” to “building facilitation capacity within an organization or group.” This resource is published by *Organizing Engagement*, an online publication dedicated to advancing knowledge, understanding, and practice at the intersection of education, organizing, engagement, and equity.
- Liberating Structures - Based on the research of Henri Lipmanowicz and Keith McCandless, *“Liberating Structures are easy-to-learn microstructures that enhance relational coordination and trust. They quickly foster lively participation in groups of any size, making it possible to truly include and unleash everyone.”* The creators of Liberating Structures provide a menu of thirty-three different designs for group interactions. Each microstructure provided in the menu has associated information about the purpose of the structure (e.g., brainstorming versus decision making), tips and traps for proactively addressing any issues that could arise when using the structure, variations on the structure, examples on how to use the structure, and minimal specifications on how to implement the structure (e.g., how to frame the invitation to the group, how the space needs to be arranged, how the groups or subgroups are configured, the sequence of steps to follow, and the estimated time for each step).
- Session Lab Library of Facilitation Techniques - The Session Lab Library is a wonderful resource that aggregates facilitation exercises and techniques from many different sources across the web (including Liberating Structures). The facilitation exercises are organized using categories that reflect the exercise’s purpose or intent. Categories include “energiser,” “idea generation,” “issue resolution,””issue analysis,” and “action.” When a user clicks on an exercise, a window appears that provides a complete description including the goals of the exercise, materials needed to complete the exercise, the sequence of steps to follow in order to complete the exercise, the amount of time allotted for each step, structural tips on ways to run the activity with a group, and the original source of the exercise. Unlike Liberating Structures, Session Lab resources enable comments from users that have used the exercise, which can be additional useful information for deciding which exercises might be the best fit for your purpose.

- Jeffrey Shuman and Janice Twombly, "Collaborative Networks Are The Organization: An Innovation in Organization Design and Management" *VIKALPA*, 35:1 (2010). https://journals.sagepub.com/doi/pdf/10.1177/0256090920100101. The Suman and Twombly article *"illustrates, using real-world examples, the benefits of collaboration, the five factors of a successful network collaboration, the value proposition of the collaborative network, and the role of the network choreographer.*" Principle #2 of the collaborative network design principles introduced by the authors describes the criticality of defining the *shared purpose of the group*: "Collaborative networks are fit for purpose. The purpose determines how the network is structured."
- Katherine Skinner, *et al*. (2018). *Community Cultivation: A Field Guide.* Retrieved from https://educopia.org/cultivation/. The Field Guide provides a tool for communities to assess their development status, identify targeted activities and tools to address their community's growth needs and measure progress toward their community's maturation and sustainability goals. The Field Guide is based on Educopia's Community Cultivation Framework which consists of four life cycle stages (Formation, Validation, Acceleration, and Transition) and five growth areas (Vision, Infrastructure, Governance, Finance & HR, and Engagement). The Field Guide also offers a snapshot of the tools, resources, and training modules Educopia has developed and regularly uses in its consulting and community-building work.

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Community Cultivators

Activity Overview

The activity that this guide describes is intended to result in a shared understanding of the challenge or opportunity that a community is joining together to address. The activity will also result in several documents that will be of longstanding value, including an anonymized list of each member's motivations for participating in the collaborative venture and a statement of shared purpose that will be used as a cornerstone of its efforts. As the community or network develops and grows, this shared purpose statement should be used to guide its decisions, including its activities, its governance structures, and the roles and responsibilities of its members. Likewise, the network's leaders may often return to the initial list of stakeholder needs, desires, and fears as one way to assess the potential viability of new approaches and to predict when stakeholders may find collaboration more appealing or more challenging.

As the community develops & grows, the shared purpose statement should be used to guide its decisions...

During the Formation Lifecycle Stage, stakeholders are likely to have varying visions about what the group should be and do. This activity surfaces those visions in order to help an emerging community's key stakeholders establish and document the common purpose that brings them together. In this activity, a facilitator first identifies relevant stakeholders (described more fully below in step 1) and invites them to participate. The facilitator then uses an asynchronous survey to solicit their individual perspectives. Then, these stakeholders meet (in person or virtually) and the facilitator hosts a series of discussions that build upon the survey responses. Each discussion will bring the group closer to consensus about their visions for their collaborative work. Each discussion will also help members to better understand each others' interests, concerns, and drivers.

The following four steps document the process a facilitator may deploy to help an emerging community to establish a common purpose, or to help an existing community to refresh or reconsider its shared purpose.

Step 1: Invite Stakeholders and Schedule Meetings

The first step in this activity is to identify and invite stakeholders and schedule the activity meetings. Even if a community has already started to form, it is useful to take stock and think about which stakeholders to invite to this series. For example, a facilitator may want to use this as an opportunity to invite people in to the community that have not been part of the core group thus far. Questions the facilitator might use to guide these invitations include the following:

- What stakeholders share an interest in the topic at hand?
- Who might be missing that would either benefit from, or bring benefit to, this collaboration?
- What level(s) of stakeholders (rank in organizations) can both participate and make commitments (time, energy, financial) to this endeavor?
- What types of organizations (e.g., public, private, corporate, academic) have shared interest in the topic and might be interested in engagement?
- Are there existing stakeholders who are already encouraging other collaborative efforts around this topic, and if so, how can you either align with them, or differentiate what you are doing from their efforts?

After determining who will be invited, the facilitator's next tasks are to determine a timeline and scope for this work, communicate clear expectations and objectives to potential attendees, and secure a commitment from potential participants.

Details to provide to invitees in the invitation include:

- tasks and activities in which they can expect to engage (e.g., combination of asynchronous and synchronous activity)
- expected time commitment from attendees; for this activity the time commitment for participants might break down as follows:
    - 15 minutes to complete the asynchronous survey (Step 2)
    - Minimum of two, one-hour synchronous meetings or work sessions (Step 4)
    - One - two hours of post-meeting synchronous work to refine and finalize the purpose statement
- what outcome the group will be aiming to yield
- link to scheduling poll or other means of determining participant availability for synchronous work
- a deadline by which you expect a reply

If possible, the facilitator should make clear to invitees that their input will explicitly shape the meeting outcome, and likewise will shape the eventual community or network and its activities.

The facilitator should adjust the timeline and the expected time commitment based on the particular network and stakeholders with whom they are working and the setting (in person vs. virtual) in which the group will meet. For example, a large group of people will likely need more time to complete this activity, as may a group of people who do not already have working relationships with each other. The degree of existing interest, the pre-meeting clarity of shared goals/needs, the complexity of the group's dynamics (e.g., are stakeholders from allied or competing organizations) and the context in which the network is forming (e.g., is the collaborative work supported by a funder or a commonly respected leader?) will impact the time this activity will take as well.

This email invitation template provides an example of how to structure, format, and sequence the requisite information to maximize clarity of communication to invited attendees.

A survey gives each stakeholder space & time to carefully consider the interests… that lead them to want to be part of this collaborative venture.

Step 2: Asynchronous Survey

In order to encourage open sharing from every stakeholder, we recommend circulating a web-based survey to all stakeholders asynchronously prior to the first meeting or session. A survey gives each individual stakeholder the requisite space and time to carefully consider the interests, both personal and organizational, that lead them to want to be part of this collaborative venture.

The survey template we provide is designed to surface the group members' shared interests, needs, and/or challenges, as well as some of their areas of divergence and potential misunderstanding. As each member answers the survey, it will auto-populate a spreadsheet with their answers.

We encourage the facilitator to edit these questions as necessary to fit the specific context of the community. Depending on the type of network or community that is forming, the emphasis here might be on the individual *or* it might be on the organization the individual represents. These questions should be adjusted accordingly. We also recommend that the survey should take no more than an hour to complete, and that participants are told how their survey responses will be analyzed, stored, and shared.

Sample survey questions include:

- **What type of organization do you represent?**
    - Knowing the representation of organizational types among the group can be helpful for a facilitator to ensure that conversations and breakout groups are designed to account for underrepresentation and overrepresentation.
- **What is your role in the organization?**
    - Knowing the roles that everyone plays within their organization is helpful in understanding the variation in professional perspective and expertise represented within the group. Through the synthesis of stakeholder responses described in Step 3, you may find that members that identify with a common role may also share common stakes in the problem. This can be useful in organizing work or designing potential interventions in the future.

- **How do you define our shared topic of interest?**
    - This question is essential for helping the facilitator determine how much work needs to be done to build shared understanding about the problem itself. While the problems that communities form to solve often change and shift in their size, scope, and urgency, it is important that the group establish a baseline of shared understanding about the core components of the problem before attempting to collectively solve the problem. The synthesis of stakeholder responses to this question in Step 3 will directly inform the agenda for the meeting sessions described in Step 4.
- **Why do you/your organization care about (topic)? What about this matters most about this topic to you or your organization? What is the relationship of this topic to your work?**
    - Responses to this question help the facilitator to understand what **motivates** members of the group.
- **What is the specific outcome you/your organization hope to accomplish with this group?**
    - This question helps the community begin to identify the expected return on investment or value proposition needed to sustain the engagement of participants.
- **What will enable you/your organization to be able to give time, energy, and possibly other resources to support this work?**
    - This question sounds similar to the previous question but is intended to elicit more specific accountability measures that make it easy for stakeholders to advocate to resource allocators within and beyond their organization for initial investment or continued support that the work the community is undertaking.

We highly recommend that facilitators consider creating an anonymous survey. Anonymity helps to address latent or obvious power dynamics among members of a group that might otherwise prevent individuals from fully sharing their views. Do note that even if the responses are anonymized, the facilitator of this activity bears responsibility for the data provided and for maintaining participants' anonymity when presenting any synthesis of the findings. This may require stripping out particular fields (e.g., "Organization" or "Role") and evaluating all answers to make sure they do not reveal the identity of the survey respondent.

The facilitator should provide the survey to stakeholders at least one week and no more than two weeks before the first meeting. This provides stakeholders enough time to carefully consider their responses, and ensures those responses are fresh in stakeholders' minds as they meet.

Please note that this survey is merely a step towards the development of a purpose statement; this step lays solid groundwork toward that goal, but will not result in a purpose statement on its own. It will provide a safe space for individual respondents to consider questions of group purpose and identity on their own and provide answers that are not influenced by the answers of other stakeholders. It will also provide the facilitator with information about the divergence and convergence of the group, as described below in Step 3. The drafting of the purpose statement will lean on the survey responses, but will mostly come out of the synchronous meetings detailed in Step 4.

Step 3: Review Survey Responses

After each individual answers the survey, the facilitator will be able to review the full set of answers via a shared (and perhaps anonymized) spreadsheet. The facilitator should use the questions below to prepare for the meeting, anticipating areas of interest that the group may need to address based on their survey responses. The facilitator should plan to spend between one and three hours reviewing and synthesizing stakeholder responses to the survey questions. This synthesis is a critical interim step that will help the facilitator to identify specific points that the group should discuss during their synchronous (in person or virtual) sessions.

1. How do individual stakeholders define their own role/profession? Are there identifiable groupings based on common responses?
2. Are there incentives/disincentives that may resonate more with particular stakeholder groups?
3. How likely are these stakeholders to recognize and understand the range of perspectives represented? Are there particular stakeholders that need to be exposed to one another?

Based on the survey results, the facilitator can proceed to Step 4, which describes the process of translating the synthesized information into an agenda or series of agendas for synchronous conversations that aim to:

- build relationships between stakeholders
- surface different stakeholder identities that are represented within the group
- probe at the ways different stakeholders and/or stakeholder groups may frame the problem or purpose that this network or community is forming to address, and
- move the group towards consensus and the co-creation of a documented, well-defined scoping statement that all participants can support

The facilitator may also choose to either provide the anonymized answers, or may provide a brief synthesis of these answers, for every attendee to review just prior to the meeting. This can provide a group with safe transparency, and prepare the ground for the meeting sessions. If the facilitator chooses to do this, they should exercise extreme caution not to accidentally identify individuals in the process, either through context or through the content itself (e.g., answers that include an organization's name or discuss situations that can be tied back to an organization or person).

Step 4: Host Meeting Sessions

At this point in the process, the facilitator has asked each stakeholder to provide some basic information using the survey template and synthesized stakeholder responses to identify potential points of alignment among members of the group. Step 4 provides an example of how to translate the synthesized information from the survey into an agenda or series of agendas for synchronous conversations.

The topics below are meant to guide discussion about common purpose during the synchronous meeting sessions. Some of these intentionally overlap with the survey questions, giving meeting attendees the opportunity to elaborate on and discuss their perspectives. The meeting should provide a venue for stakeholders to get to know one another better, including their needs, interests, and drivers, and how these might align around a common purpose.

> **The meeting should provide a venue for stakeholders to get to know one another better, including their needs, interests, and drivers, and how these might align around a common purpose.**

- **What is your occupation and/or professional background and/or role in the group or effort?**
    - Especially if the group is interprofessional, it is useful to begin by sharing and discussing each member's role within their profession or organization. In the resulting conversations, you may find that members that identify with a common role may also share common stakes in the problem. This can be useful in organizing work or designing potential interventions in the future.

- **How do you define the key concept that unites your group?**
    - There is likely to already be a key concept that unites the group (such as "open infrastructure" or "data governance)." Ask each individual to share how they define it in their own words. This will help to reveal where the group is closely aligned, and where the group needs to concentrate energy on building shared understanding.

- **Describe how the key concept affects your personal practice? What are your stakes in the key concept?**
    - It is helpful to understand how each person uniquely relates to the problem. Sometimes this relationship can be thought of in terms of stakes - what each participant might have to gain or lose. Sometimes the effect is more direct,

such as an obstacle in a particular workflow. Understanding how each member of the group relates to the problem, either directly or indirectly helps to understand how and why the problem is important.

- **Why do you engage in the key concept? What does the key concept mean to you?**
    - A problem may impact members of the group in ways that are very similar or quite distinct. Asking about the personal meaning of a problem can help to surface the motivations behind a person or a group's willingness to invest in collective action.

- **Where and how does the problem show up in your organization?**
    - This question asks for details about how the problem or topic appears in the day to day activities of their organization. For example, are their specific workflows, processes or activities of the organization that impact or are directly impacted by the problem. Considering this question across the group will help everyone to better understand the nature of the work involved for specific organizations or organizational types.

- **How is existing work on the problem currently supported?**
    - Use this question to spark conversation about the ways this problem is supported by the individuals, organizations, and/or fields represented by participants, either nominally through institutional policy, or directly through specific actions. While individual practitioners are the ones to identify key problem areas through their work, it often requires an organizational commitment to solve the problem in collaboration with other organizations.

We have provided a sample agenda for meeting sessions (template). The focus and sequence of each meeting are summarized below:

Session #1: Defining our Shared Topic of Interest (Who? and What?)
Building shared understanding of the makeup of the group (e.g., motivations and why the problem matters), and arriving at a common definition of the problem the group is interested in solving together.

Session #2 Agenda: What Assets or Resources Do We Bring to this Problem (How?)
Building shared understanding of the broader ecosystem or field of interest, and the current work happening around the problem, including the current resources that are supporting that work.

Session #3 Agenda: Articulating our Purpose (Who?, What?, How?)
Bringing all the pieces together from the previous information gathering and synchronous sessions together, mirroring back to the group all the raw components of a statement of purpose that they have generated so far.

Step 5: Create Draft Vision of Scoping Statement

At this point, the group has all of the text or data that it needs to draft a clear statement about the purpose of its work.

We recommend that the facilitator identify two volunteers from the stakeholder group at the end of the third meeting (in the example series outlined above) to draft the purpose statement. This work can take place asynchronously or synchronously but it should take place within two weeks of the last meeting with the whole group.

Once the purpose statement has been drafted, the two volunteers should send the draft to the entire group for a time-bounded review and comment period (one to two weeks maximum). The same volunteers or a different set of volunteers should then create a second draft reflecting the feedback received from the rest of the group - and if there are issues that surfaced in the comment period that need to be addressed in greater detail, the facilitator should consider scheduling a follow-up call or determining a way of engaging the group on the issue asynchronously.

Next Steps

The purpose of this *"Vision in Formation: Articulating Your Community's Purpose"* facilitator guide and activity is designed to develop a shared understanding of the challenge or opportunity that your group is coming together to address. It will result in a Vision or Scoping statement that can be used as a cornerstone of your community's efforts. Once the Vision or Scoping statement has been drafted, your group has a documented boundary or criterion that it can use for determining potential participants, contributors, partners, funders, and other stakeholders that you might engage or ask to contribute to the vision and scope of your community's effort.