Liberating Structures
Leading & Innovating
by Including and Unleashing Everyone

Keith McCandless
Henri Lipmanowicz
Social Invention Group
Liberating Structures

Engaging everyone in shaping...

Transforming Movements

Everyday Solutions

Strategy + Design

Big Projects
Today’s Menu

1. 1-2-4-All *Strategy*
2. Shift and Share 2 X 6
3. 3X Celebrity Interview
4. Ecocycle
5. Panarchy
6. Critical Uncertainties
7. Min Specs
8. Purpose-To-Practice
9. Strategy Safari MT
10. Storytelling (Arvind)
11. Social Network Webbing

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A G E N D A

Strategy + Design Workshop # 3

1. 1-2-4-All *Strategy*
2. Shift and Share 2 X 6
3. 3X Celebrity Interview
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Story by Arvind Singhal
1-2-4-All

What is Strategy?

• What differentiates strategy work from other activities?

Generate pithy statements or examples that illuminate the difference as unambiguously as possible.
Problems & Opportunities

Awareness Iceberg

4% known to top
9% known to middle
74% known to supervisors
100% known to the front line and customers

Internationally acclaimed study conducted by Sidney Yoshida, initially presented at the International Quality Symposium
Group Possibilities

LS work best when there is a shared challenge with a local context—when including more people will help you make progress.
LS Micro-Structures

- Make an Invitation
- Sequence & Allocate Time
- Distribute Participation
- Micro-organizing Design Elements
- Arrange Space
- Configure Groups
## Design Storyboard
### Strategy Planning and Diffusion

<table>
<thead>
<tr>
<th>Topic or Phase</th>
<th>Goal</th>
<th>LS Micro-Structure</th>
<th>Why this LS?</th>
<th>Steps / Timing</th>
<th>Facilitator / Participants</th>
</tr>
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[www.liberatingstructures.com](http://www.liberatingstructures.com)
Special Guests
People with experience you can ask for a little help

• **Tim Jassko-Fisher**, Court Improvement Training Academy, UW School of Law + network

• **Joelle Everett**, Sound Resources, Plexus Institute

• **Molly Angel**, Providence Health System

• **Ted Lord**, poet & philanthropy sherpa

• **Neil McCarthy**, McCarthy Consulting Group (leadership development and business)

• **Dr. Arvind Singhal + changemakers network**

• **Michael Gardam + infection prevention crew**

• **Liz Rykert**

• **Alison Joslyn**

• **Larry McEvoy**

• **Jeff Cohn**

• **Henri Lipmanowicz**
**Shift and Share**

**Preparation**
- Invite individuals to share 7 minute presentations of prototypes or innovations
- Divide the community into 7 learning groups. Count off: 1,2,3,4,5,6,7
- Assign each presenter a letter (A, B, C, D as needed) for a station in the room
- Each presenter repeats their presentation to each group

**Start Round I**
- Presenters have 7 minutes with each group. This includes any questions and comments... so “cut to the chase.”
- Ding. Time to shift.
- Group 1, go to Station B. Group 2, go to Station C... Group 7, go to Station A.
- And so on for 3 rounds.

**Start Round 2...**
## Shift and Share

### 2 Rounds of 6 Presenters (3 X)

<table>
<thead>
<tr>
<th>Round 1</th>
<th>Round 2</th>
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<tbody>
<tr>
<td>a. Alison Joslyn</td>
<td>a. Michael Gardam</td>
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<tr>
<td>b. Larry McEvoy</td>
<td>b. Kirsten Johnson</td>
</tr>
<tr>
<td>c. Jeremy Lightsmith</td>
<td>c. Liz Rykert</td>
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<tr>
<td>d. Neil McCarthy, Glauco Ferrari</td>
<td>d. Arvind Singhal</td>
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<td>e. Fisher Qua</td>
<td>e. Jeff Cohn</td>
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<tr>
<td>f. Paige Reason, Leah Gittterman</td>
<td>f. Henri Lipmanowicz (GDL)</td>
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Celebrity Interview
with
Alison, Larry, and Michael
Celebrity Interviews

In Charge But Not In Control

Alison, Michael, Larry

- When you first got started, what was going on for you to look for something different?
- Leaders are usually enthralled with Macro structures, what caught your attention about LS microstructures?
- What made/makes working with LS it a challenge?
- How did you make LS more than flavor of the moment?
- What was a first mistake you made with LS?
- What was big successes early on in you work?
- What did you hope could happen for you and your followers?
- What is your next move? Is there another level? How do you level up?
Activity & Relationship List
Where are you spending time? (key strategies)
What are your top strategic relationships?

• Current Activities
  – ...
  – ...
  – ...
  – ...
  – ...

• Top Relationships
  – ...
  – ...
  – ...
  – ...
  – ...
Exploring the Ecocycle

Henri Lipmanowicz & Keith McCandless
Conventional Lifecycle

**BIRTH**
Adhocracies, Exploitation
Entrepreneur-As-Leader

**GROWTH**
Strategic, “Rational” Management

**MATURITY**
Conservation & Routinization
Bureaucrat-As-Leader

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The “Neglected” Back Loop

RENEWAL
Exploration/Invention/Reorganization
Network Weaver-As-Leader

LEADERSHIP
Envisioning new options

CREATIVE DESTRUCTION
Release/Crisis/Confusion
Heretic-As-Leader

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Ecocycle

BIRTH
Entrepreneurial Action
Entrepreneur-As-Leader

RENEWAL
Exploration/Invention /Reorganization
Network Weaver-As-Leader

MATURITY
Conservation & Routinization
Bureaucrat-As-Leader

CREATIVE DESTRUCTION
Release/Crisis/Confusion
Heretic-As-Leader

Poverty Trap
Not funding innovation

Gathering

Rigidity Trap
Not letting go

Sifting

Adapted from Brenda Zimmerman,
EdgeWare & Getting To Maybe
Ecocycle Worksheet Sample
Group: ______

1. Birth
   Growing

2. Maturity
   Harvesting
   Relationship, Activity

3. Creative Destruction
   Plowing
   Activity, Relationship

4. Renewal
   “Sowing”
   Activity, Relationship

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**STEPS**

- Use the list of activities and/or relationships, reflect on your own, generating a first draft.
- With one partner, coach each other to construct an Ecocycle map – 5 minutes each (10 minutes total).
- In your group of four, decide where to place the activities on the large wall Ecocycle map or flip chart page (5 minutes).
- Make sticky notes and put them on the map.
Ecocycle Insights & Next Steps

- Change is continuous along the cycle
- Renewal requires destruction
- Need for crisis -- root word “to sift”
- Need for firebreaks, don’t burn the whole forest
- Patch dynamics or balance in your activities are key to long term survival and adaptability
- Create conditions for renewal and more births

Next Steps

- Move into action with TRIZ, 25/10, Design Storyboard and Open Space
Panarchy Defined

- Panarchy is a framework of nature's rules.
- Pan, the Greek god of nature, evokes an image of unpredictable & whimsical change.
- Systems are embedded in systems and their interdependency matters!
Panarchy example from an infection prevention research project conducted in the US. Each dot represents a “current reality” assessment by experts at that level. Note that both MRSA bacteria and the societal myth of inevitability can be framed with the same “lens.” Project organizers used the Panarchy to diffuse insights and spread innovations from their work. Opportunities for spread were easier to see with a multi-scale perspective.

**Public Perception “Myth”**
MRSA is (NOT) an inevitable part of modern healthcare (Rigidity Trap?)

**Medicare Policy**
shifting to non payment & transparency for HAIs

**Industry or Sector**
Prevention Practices
still trying & wasting $ to educate, bribe or punish (Rigidity Trap?)

**Hospital Beta Sites’**
Prevention Practice
trying to invest more in spreading PD/safe practices to others (Poverty Trap?)

**Individual Project Leader**
(Nancy)
stops over-controlling, unleashing more unit-based self-organization

**Community strain**

**Healthcare associated**

**MRSA Bacteria**
is exploiting growth opportunities in community & clinical settings
Panarchy

Micro level

Region, Industry, Sector

Unit, Organization, Network, Community

Individuals, Group

Social, Mythical level

Policy

Micro level
Below right, a Panarchy chart developed during a leadership network meeting.

A Native American school serving Crow and Cheyenne reservations in Montana is a system-within-systems, fast at the bottom and slow at the top. This Panarchy includes (from lower left to the upper right): the health status of students... within student groups... in a single school... within the community school system... to Bureau of Indian Affairs national policies... to myths about native students ability to compete academically. When planning for the future, interdependencies among levels matter.
Critical Uncertainties

Preparing and Practicing Strategy-Making for Surprising-Yet-Plausible Futures
• **What elements of your business are both critical and uncertain?**
  – Think about events and driving forces that make you vulnerable.

• **Use 1-2-4-All to generate and sift ideas**
Plausible Unfolding Futures 2013-2023

Gushing New Product Pipeline

Scenario 1 Hope

Scenario 2 Nirvana

Scenario 3 Survival

Scenario 4 Sinking Ship

Trickling New Product Pipeline

Weak Patent Protection

Strong Patent Protection

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Resources +++
Large active organizations, social network + financial resources

Scenario 1
Scenario 2
Scenario 3
Scenario 4

Plausible Unfolding Futures 2013-2023

LS Popular w Leaders
LS ignored by Leaders

Resources +
Keith and Henri Only
Critical Uncertainties

Brainstorm a list of top contenders

1. Create a continuum for each critical uncertainty with extremes on each end
2. Use the matrix to plot your selections
3. Create dramatic titles for each quadrant
4. Describe the operating reality of this quadrant
5. Imagine strategies for how you would successfully operate in each quadrant
6. Discern which strategies are robust and hedging

Narrow the list to the top two

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Strategy and Action

• Robust
  – Make sense in multiple scenarios

• Hedging
  – Make sense in one or two scenarios
  – Worthy just-in-case investments
P2P Worksheet

1. Purpose
Why is the work important to you and the larger community?

5. Practices
What are we going to do? What will we offer to our users/clients? How?

3. Participants
Who must be included to achieve our purpose?

4. Structure
How will we organize to distribute control?

2. Principles
What rules must we obey in pursuit of our purpose?

Participants:
1. ...
2. ...

Principles:
Must dos & must not dos include:
1. ...
2. ...

Practices:
1. ...
2. ...
3. ...

Purpose: ____ exists to...
Minimum Specs

Unleashing Innovation & Action by Specifying Only “Must-do’s” & “Must-not-do’s”
Min Specs
With Each Item on Your List, Ask This Question

<table>
<thead>
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<th>Can you violate this requirement and still achieve your purpose?</th>
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<tr>
<td>2. To do item...</td>
<td>If “yes,” cross it off your list. It is NOT a Min Spec.</td>
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<tr>
<td>3.</td>
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<td>4.</td>
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Min Specs

- **Boundary** – clarify which opportunities/situations fit the work focus or purpose
- **Connectivity** – specify people and information must be connected (or excluded!)
- **Process** – identify key features that must be part of the process
- **Prioritization** – how to rank or sort opportunities
- **Timing** – how to fit the pace of work to the context or external requirements for speed or turnaround time
- **Exit** – when to drop, end or creatively destroy an activity
Your “To Do” List
for your challenge
(often a long list of Max Specs)

• ...
• ...
• ...
• ...
• ...
# Min Specs

*With Your Max Spec List, Ask These Questions*

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Why is the work important to you and the larger community?

Purpose: ____ exists to...

2. Principles
Must dos & must not dos include:
1. ...
2. ...

3. Participants
Who must be included to achieve our purpose?
1. ...
2. ...

4. Structure
How will we organize to distribute control?
1. ...
2. ...
3. ...

5. Practices
What are we going to do? What will we offer to our users/clients? How?
1. ...
2. ...
3. ...

Participants: 1. ...
Principles: Must dos & must not dos include:
1. ...
2. ...

P2P Worksheet
Learning and Networking Resources

Plexus ACTION 2013: Tales, Tools, and Tactics
April 18-20, 2013 - Silver Spring, MD
Silver Spring Civic Building

Conference Flyer (pdf)

**action·ary** [ak-shuhn- er-ee] adjective

1. given to or characterized by proactivity
2. a visionary who moves from idea to application
3. tendency to take on big challenges

This is a conference for people who want to take ideas off the white board and into the world.
LS Wksp #4
April 3-4
Transforming Movements
Strategy + Design
:: Big Projects
:: Everyday Solutions
Liberating Structures

- LS website [www.liberatingstructures.com](http://www.liberatingstructures.com)
- Book: Liberating Structures: Including and Unleashing Everyone (in progress)
- keith@liberatingstructures.com
  - henri@liberatingstructures.com
Mad Tea Strategy Safari Rules

Form two circles.
You will find yourself directly across from one other person. One person facing “out” and the other “in.” Finish the sentence that appears on the screen.

1) Stay curious & dig deep

2) Switch roles ~ one ding

3) Move two spaces to the right ~ two dings
What first inspired me in this work is…
An *uncertainty* we must creatively adapt to is...
What I find challenging in our current situation is...
What I hope can happen for us in this work is…
In our operating environment, something we are learning to live with is…
A courageous conversation we are not having is...
A big innovation opportunity I see for us is...
In our operating environment, an uncertainty we are learning to live with is...
A concept or practice helping us adapt creatively is...
Something I will never go back to is...
If we do nothing, the worst thing that can happen for us is...
An innovative project that gives me confidence we are transforming is...
Something we should stop doing (or divest) is…
A question that is emerging for me is…
I like a Mad Tea Party because...
1-2-4-All
What shared answers are starting to emerge?

Adapted from ThePrimes, Chris McGoff
1. Operating Environment

- What is happening around us that demands adaptation?
- In our operating environment, something we are learning to live with is…
- An *uncertainty* we must creatively adapt to is…

Jot down the best answers you heard, pass it to your right, again, again, again, again…
2. Current State

- Where are we starting, really?
  - What I find challenging in our current situation is…
  - A courageous conversation we are not having about where we are now is…

Jot down the best answer you heard, pass it to your right, again, again, again, again…
3. Vision

• Given our purpose, what seems possible now?
  • What first inspired me in this work is…
  • What I hope can happen for us in this work is…
  • A big innovation opportunity I see for us is…

Jot down the best answers you heard, pass it to your right, again, again, again, again...
4. Stake

• What is at stake if we do not change?

  – If we do nothing, the worst thing that can happen for us is…
  – Something I will never go back to is…

Jot down the best answers you heard, pass it to your right, again, again, again…
5. Strategic Action

• How are we breaking away from the current state toward the future?
  
  – Something we must stop doing (divest) is…
  – Something we should start doing (invest in) is…
  – One innovative project that gives me confidence we are transforming now is…
What³ Debrief

• WHAT?
  • What facts, data, & observations stand out?

• SO WHAT?
  • How do you explain what you see? Based on your observations, do you see a pattern? Is it important?

• NOW WHAT?
  • What action may help you move forward? Who else should be here?
# The Ladder of Inference

<table>
<thead>
<tr>
<th>Level</th>
<th>Description</th>
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<tbody>
<tr>
<td><strong>Data</strong></td>
<td>I select from observations</td>
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<tr>
<td><strong>Meanings</strong></td>
<td>I add (cultural &amp; personal)</td>
</tr>
<tr>
<td><strong>Assumptions</strong></td>
<td>I make based on meanings</td>
</tr>
<tr>
<td><strong>Conclusions</strong></td>
<td>I draw</td>
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<tr>
<td><strong>Beliefs</strong></td>
<td>I adopt about the world</td>
</tr>
<tr>
<td><strong>Actions</strong></td>
<td>I take based on beliefs</td>
</tr>
</tbody>
</table>

**1. What?**
- Observable data and experiences

**2. So What?**
- Adapted from Chris Argyris, Harvard

**3. Now What?**
- Climbing Up & Down

Reflexive Loop
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